Australian Government

MERIT

Monitoring, **E**valuation, **R**eporting and **I**mprovement **T**ool

USER GUIDE

FOR ADMINISTRATORS

AND EDITORS

Version 2

Acknowledgement of Traditional Owners and Country

The Australian government acknowledges Australia's Traditional Owners and pays respect to Elders past and present of our nation's Aboriginal and Torres Strait Islander communities. We honour the deep spiritual, cultural and customary connections of Tradional Owners to the Australian landscape, including Australia's waterways, land and sea country.

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HOW TO USE THIS GUIDE

This guide is designed to help MERIT (Monitoring, Evaluation, Reporting, and Improvement Tool) users with the day-to-day practical application of MERIT. The user guide is easy to navigate and is the standard departmental training for funding recipients in MERIT. This guide will be made available for download on the internet http://www.nrm.gov.au/my-project/monitoring-evaluation-reporting-and-improvement-tool-merit/user-guides, and subject to updates over time.

SYMBOLS

This guide uses the following symbols throughout.

Indicates an important fact / note

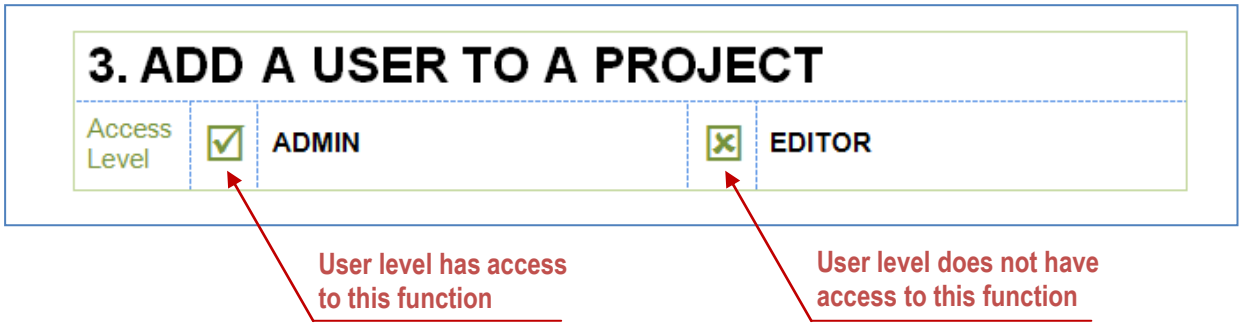
Indicates helpful information

USER PERMISSIONS

There are 3 user permission levels in MERIT. The permission level determines which functions of MERIT are available to the user.

	View project information	Input and edit activity data	Input and edit plan data	Access Admin tab	Submit project data and reporting	Assign / edit access permissions	Approve submitted plans and reports
Editor	✓	✓	✓				
Administrator	✓	✓	✓	✓	✓	✓	
Grant Manager (departmental officers only)	✓	✓	✓	✓	✓	✓	✓

At the top of each Information Sheet within this user guide is a table indicating the user permission level required for that particular function. For example:


3. ADD A USER TO A PROJECT
Access Level
ADMIN
EDITOR
User level has access to this function
User level does not have access to this function

INTRODUCTION

Overview of MERIT

Why did reporting move online?

Organisations and individuals who receive funding under Australian Government NRM programmes are required to report regularly to the Department on the progress of their projects. Previously, this reporting was done on paper based reporting forms. This often caused variation in reporting between NRM projects and programmes. In turn, this made it difficult to collate information to tell a whole-of-programme story about the impact of NRM investments.

MERIT (the monitoring, evaluation, reporting and improvement tool) is an online reporting system that simplifies and streamlines reporting across Australian Government NRM programmes. MERIT is a collaborative effort between the Department and the Atlas of Living Australia (www.ala.org.au) and launched in December 2013.

MERIT:

- simplifies reporting for funding recipients, enables a more complete project record and shows a direct link between project activities and biodiversity conservation,
- allows greater transparency and increased efficiencies for the Australian Government,
- enables project data to be used by the Australian Government for more comprehensive reporting of programme achievements and high level strategies (e.g. Australia's Biodiversity Conservation Strategy and the State of the Environment Report),
- allows for information to be standardised across programmes and project stories to be made available for public learning,
- enables MERIT users and the public to search for projects in their area or projects doing similar work, and
- responds to funding recipient feedback that they want to know what is happening with the information they provide to the Department in their reports.

What information is publicly available?

'Public' information is viewable by anyone who visits the MERIT website. Currently, public information is limited to:

- MERIT homepage, including the **Map**, **Projects** and **Dashboard** tabs
- Individual project's **Overview** tab, which displays basic project information that is already publicly available through the Department's website.

Eventually, the majority of data and information reported will be presented publicly except for sensitive data such as sacred sites and threatened species locations. Examples of information to be made public may include reported data, photos and maps.

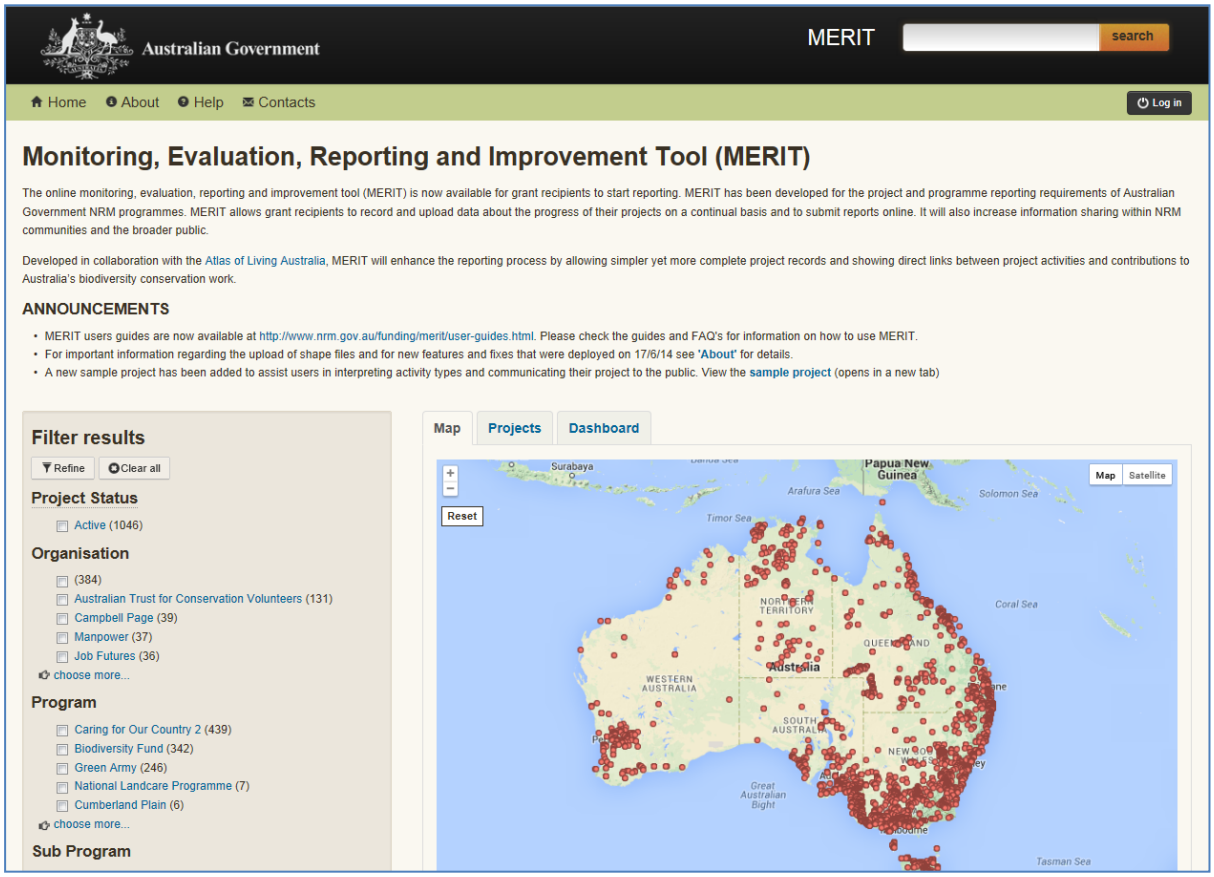
Which internet browser should I use to view MERIT?

While MERIT is available through all browsers, including Internet Explorer, it achieves best performance with Google Chrome or Mozilla Firefox.

MERIT Home Page

The MERIT home page can be seen by anyone and contains a map and list of all projects in MERIT. You don't have to be a MERIT user to view and search this information.

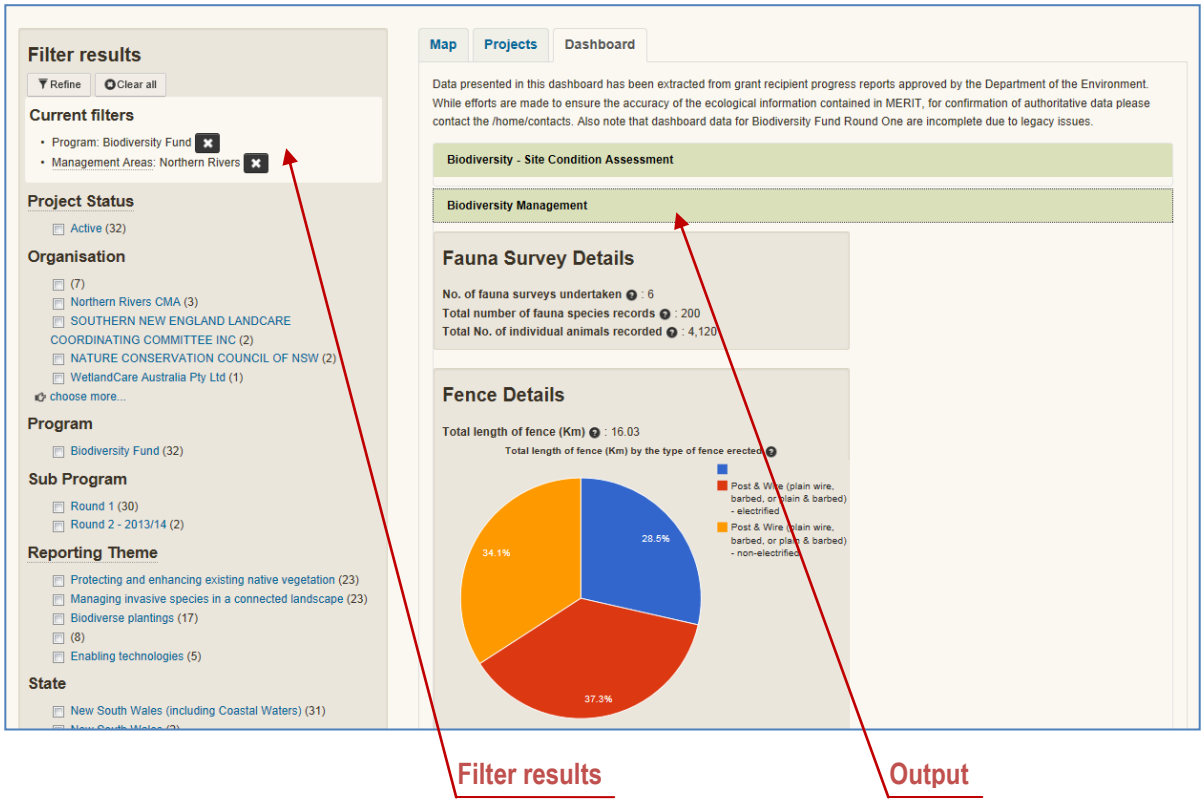
The projects displayed on the home page can be filtered using the options in the **Filter results** box or typing a search term into the **Search** function (refer to Information Sheet 2 for guidance on searching). The default view is all projects currently in MERIT.


Australian Government
MERIT
search
Home
About
Help
Contacts
Log in
Monitoring, Evaluation, Reporting and Improvement Tool (MERIT)
The online monitoring, evaluation, reporting and improvement tool (MERIT) is now available for grant recipients to start reporting. MERIT has been developed for the project and programme reporting requirements of Australian Government NRM programmes. MERIT allows grant recipients to record and upload data about the progress of their projects on a continual basis and to submit reports online. It will also increase information sharing within NRM communities and the broader public.
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance the reporting process by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.
ANNOUNCEMENTS
MERIT users guides are now available at http://www.nrm.gov.au/funding/merit/user-guides.html. Please check the guides and FAQ's for information on how to use MERIT.
For important information regarding the upload of shape files and for new features and fixes that were deployed on 17/6/14 see 'About' for details.
A new sample project has been added to assist users in interpreting activity types and communicating their project to the public. View the sample project (opens in a new tab)
Filter results
Refine
Clear all
Project Status
Active (1046)
Organisation
(384)
Australian Trust for Conservation Volunteers (131)
Campbell Page (39)
Manpower (37)
Job Futures (36)
choose more...
Program
Caring for Our Country 2 (439)
Biodiversity Fund (342)
Green Army (246)
National Landcare Programme (7)
Cumberland Plain (6)
choose more...
Sub Program
Map
Projects
Dashboard
Reset
Map
Satellite
Surabaya
Papua New Guinea
Arafura Sea
Solomon Sea
Timor Sea
Coral Sea
Australia
WESTERN AUSTRALIA
Great Australian Bight
Tasman Sea

The MERIT home page consists of the following tabs:

- **Map** – displays the location of projects. Use the buttons at the top left of the map (or double click your left mouse button) to zoom. Click and drag your mouse cursor to pan. Colour the project locators according to a set of pre-defined filters (organisation, program, state etc) by clicking the button at the bottom left of the map.
- **Projects** – lists the projects, starting with the project most recently updated.

- **Dashboard** – provides a visual representation of aggregated output data across multiple projects. For example, to see results of Biodiversity Fund projects in the Northern Rivers management area, choose the appropriate filters in the **Filter results** box. Click on each output to view the graph. Programme level dashboards only display data sourced from approved reports.

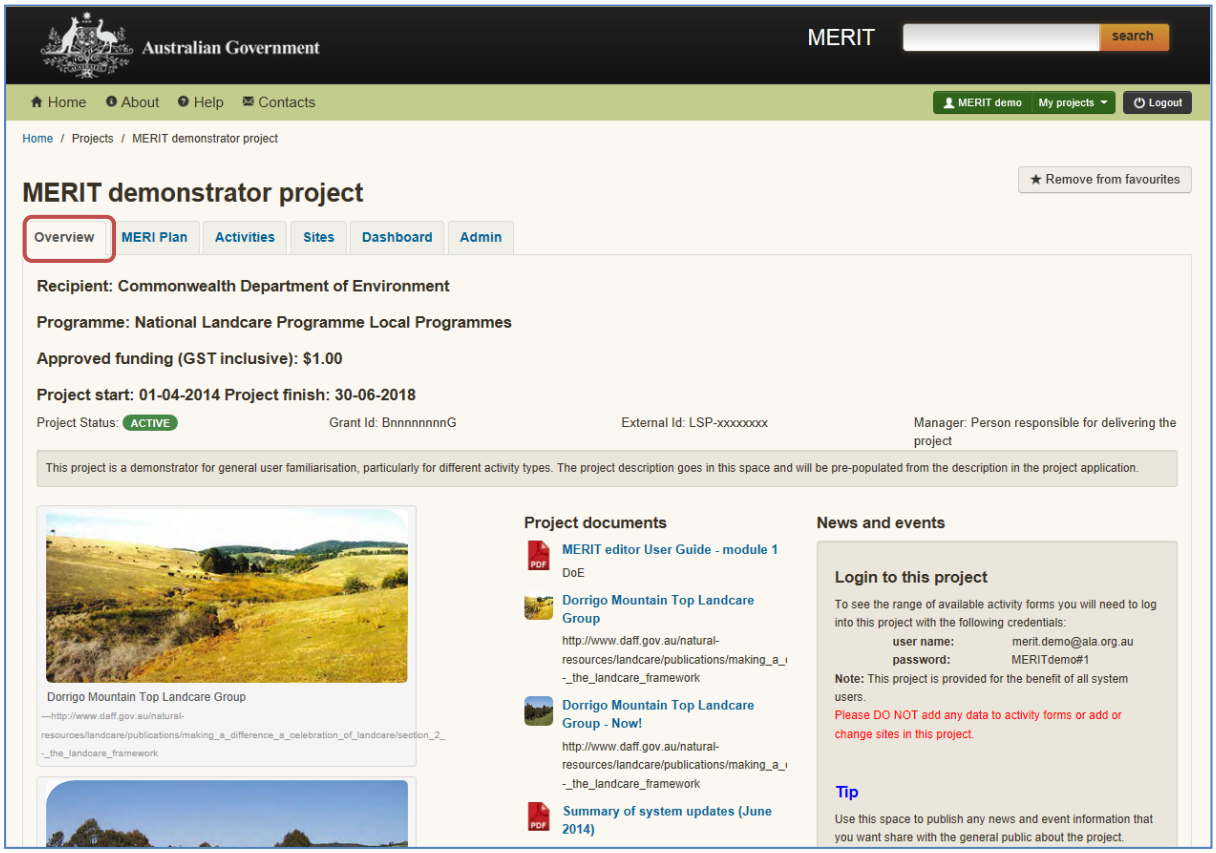

Filter results
Refine
Clear all
Current filters
Program: Biodiversity Fund
Management Areas: Northern Rivers
Project Status
Active (32)
Organisation
(7)
Northern Rivers CMA (3)
SOUTHERN NEW ENGLAND LANDCARE COORDINATING COMMITTEE INC (2)
NATURE CONSERVATION COUNCIL OF NSW (2)
WetlandCare Australia Pty Ltd (1)
choose more...
Program
Biodiversity Fund (32)
Sub Program
Round 1 (30)
Round 2 - 2013/14 (2)
Reporting Theme
Protecting and enhancing existing native vegetation (23)
Managing invasive species in a connected landscape (23)
Biodiverse plantings (17)
(8)
Enabling technologies (5)
State
New South Wales (including Coastal Waters) (31)
Map
Projects
Dashboard
Data presented in this dashboard has been extracted from grant recipient progress reports approved by the Department of the Environment. While efforts are made to ensure the accuracy of the ecological information contained in MERIT, for confirmation of authoritative data please contact the /home/contacts. Also note that dashboard data for Biodiversity Fund Round One are incomplete due to legacy issues.
Biodiversity - Site Condition Assessment
Biodiversity Management
Fauna Survey Details
No. of fauna surveys undertaken : 6
Total number of fauna species records : 200
Total No. of individual animals recorded : 4,120
Fence Details
Total length of fence (Km) : 16.03
Total length of fence (Km) by the type of fence erected
28.5%
34.1%
37.3%
Post & Wire (plain wire, barbed, or plain & barbed) - electrified
Post & Wire (plain wire, barbed, or plain & barbed) - non-electrified
Filter results
Output

Project Shells

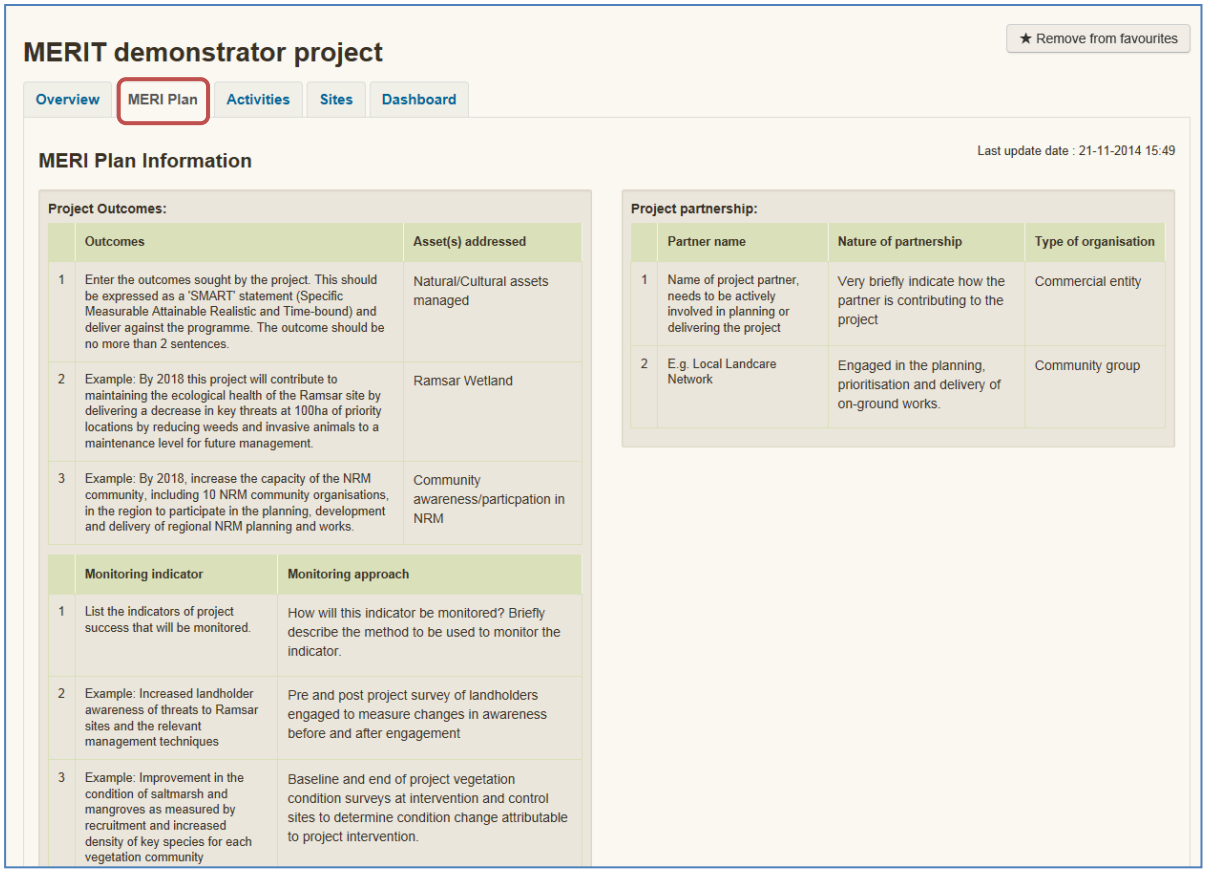
Each MERIT project shell is linked to the Department's Grants Management System (GMS).

Each shell consists of the following tabs:

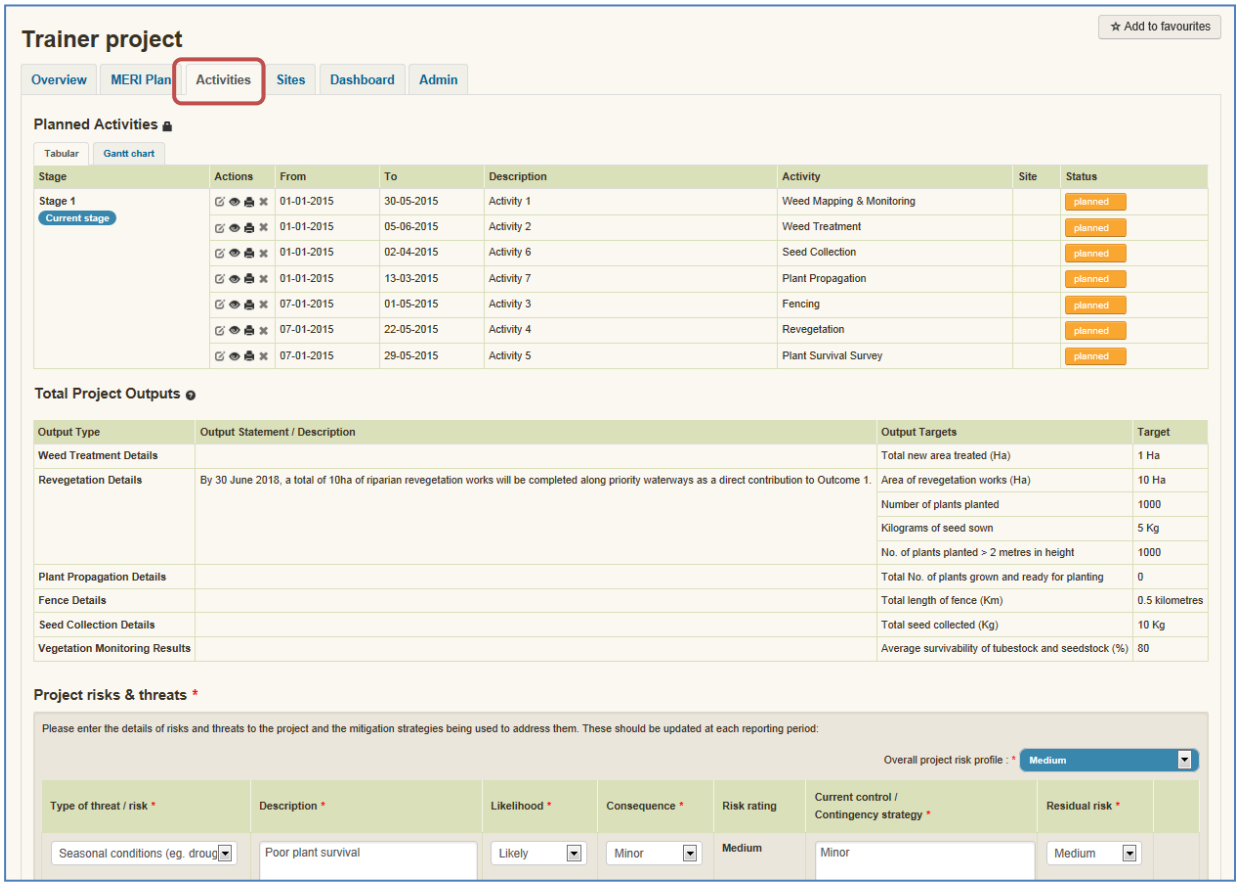
- **Overview** –This is the only tab that can be viewed by anyone who visits MERIT without logging in. Displays project information sourced from GMS and the project application form. Funding recipients can also attach project documents, photos, sound bytes, videos, news and information via the Admin tab (see Information Sheets 11 and 13). Attachments can be made public or viewable only by project members.


Australian Government
MERIT
search
Home
About
Help
Contacts
MERIT demo
My projects
Logout
Home / Projects / MERIT demonstrator project
MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
Admin
Recipient: Commonwealth Department of Environment
Programme: National Landcare Programme Local Programmes
Approved funding (GST inclusive): $1.00
Project start: 01-04-2014 Project finish: 30-06-2018
Project Status: ACTIVE
Grant Id: BnnnnnnnnG
External Id: LSP-xxxxxxxx
Manager: Person responsible for delivering the project
This project is a demonstrator for general user familiarisation, particularly for different activity types. The project description goes in this space and will be pre-populated from the description in the project application.
Dorrigo Mountain Top Landcare Group
Project documents
MERIT editor User Guide - module 1
DoE
Dorrigo Mountain Top Landcare Group
Dorrigo Mountain Top Landcare Group - Now!
Summary of system updates (June 2014)
News and events
Login to this project
To see the range of available activity forms you will need to log into this project with the following credentials:
user name: merit.demo@ala.org.au
password: MERITdemo#1
Note: This project is provided for the benefit of all system users.
Please DO NOT add any data to activity forms or add or change sites in this project.
Tip
Use this space to publish any news and event information that you want share with the general public about the project.

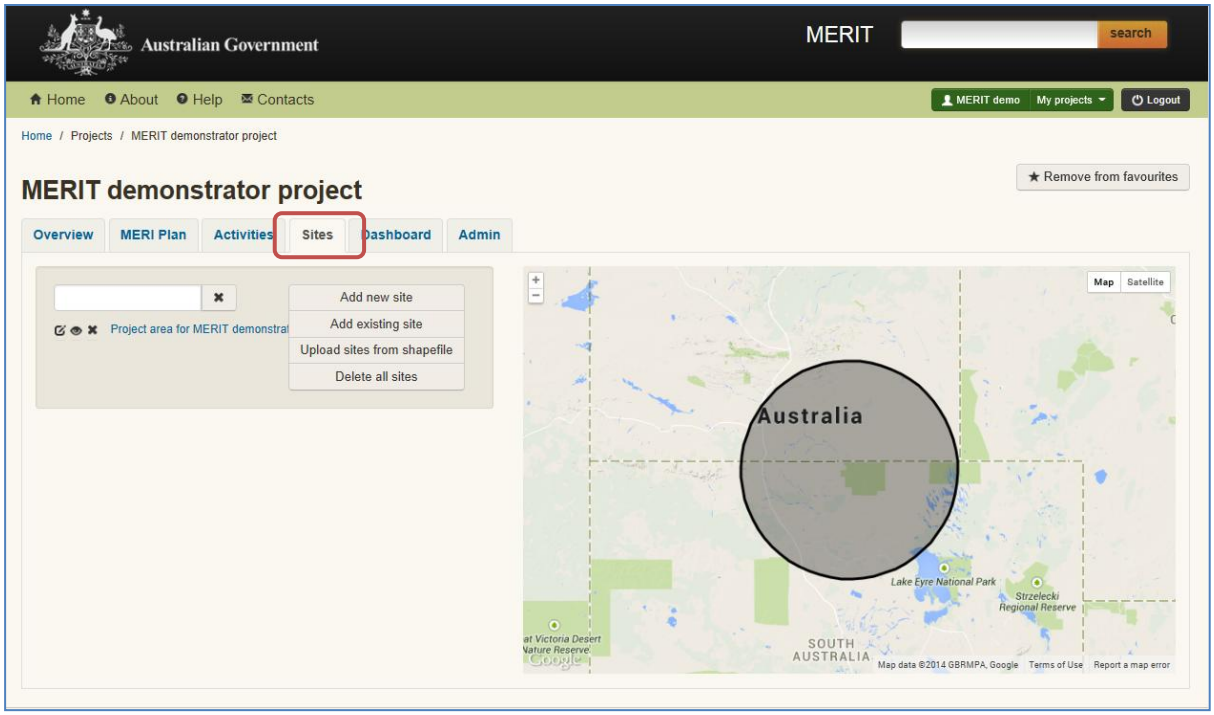
- **MERI Plan** – displays the information previously contained in the paper MERI plan. Administrators can edit the MERI Plan via the Admin / MERI Plan sub-tab. Project risks and threats are added via the Activities tab (see Information Sheet 5).


MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
MERI Plan Information
Last update date : 21-11-2014 15:49
Project Outcomes:
Outcomes
Asset(s) addressed
1
Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. The outcome should be no more than 2 sentences.
Natural/Cultural assets managed
2
Example: By 2018 this project will contribute to maintaining the ecological health of the Ramsar site by delivering a decrease in key threats at 100ha of priority locations by reducing weeds and invasive animals to a maintenance level for future management.
Ramsar Wetland
3
Example: By 2018, increase the capacity of the NRM community, including 10 NRM community organisations, in the region to participate in the planning, development and delivery of regional NRM planning and works.
Community awareness/particpation in NRM
Monitoring indicator
Monitoring approach
1
List the indicators of project success that will be monitored.
How will this indicator be monitored? Briefly describe the method to be used to monitor the indicator.
2
Example: Increased landholder awareness of threats to Ramsar sites and the relevant management techniques
Pre and post project survey of landholders engaged to measure changes in awareness before and after engagement
3
Example: Improvement in the condition of saltmarsh and mangroves as measured by recruitment and increased density of key species for each vegetation community
Baseline and end of project vegetation condition surveys at intervention and control sites to determine condition change attributable to project intervention.
Project partnership:
Partner name
Nature of partnership
Type of organisation
1
Name of project partner, needs to be actively involved in planning or delivering the project
Very briefly indicate how the partner is contributing to the project
Commercial entity
2
E.g. Local Landcare Network
Engaged in the planning, prioritisation and delivery of on-ground works.
Community group

- **Activities** – displays a list of project activities planned to be completed, based on the project MERI plan and/or grant application form. Also lists total project output targets and risks & threats for the project. Output targets are the total outputs that a project has committed to achieve. The list of total project outputs is generated automatically according to the planned activities selected. At this stage, the output target values are entered manually (see Information Sheet 5). Future enhancements of MERIT may enable targets to be captured from the project application form.



- **Sites** – users can create, view, edit sites and points of interest for their project. See Information Sheet 7 and Information Sheet 8 for guidance on sites and points of interest.

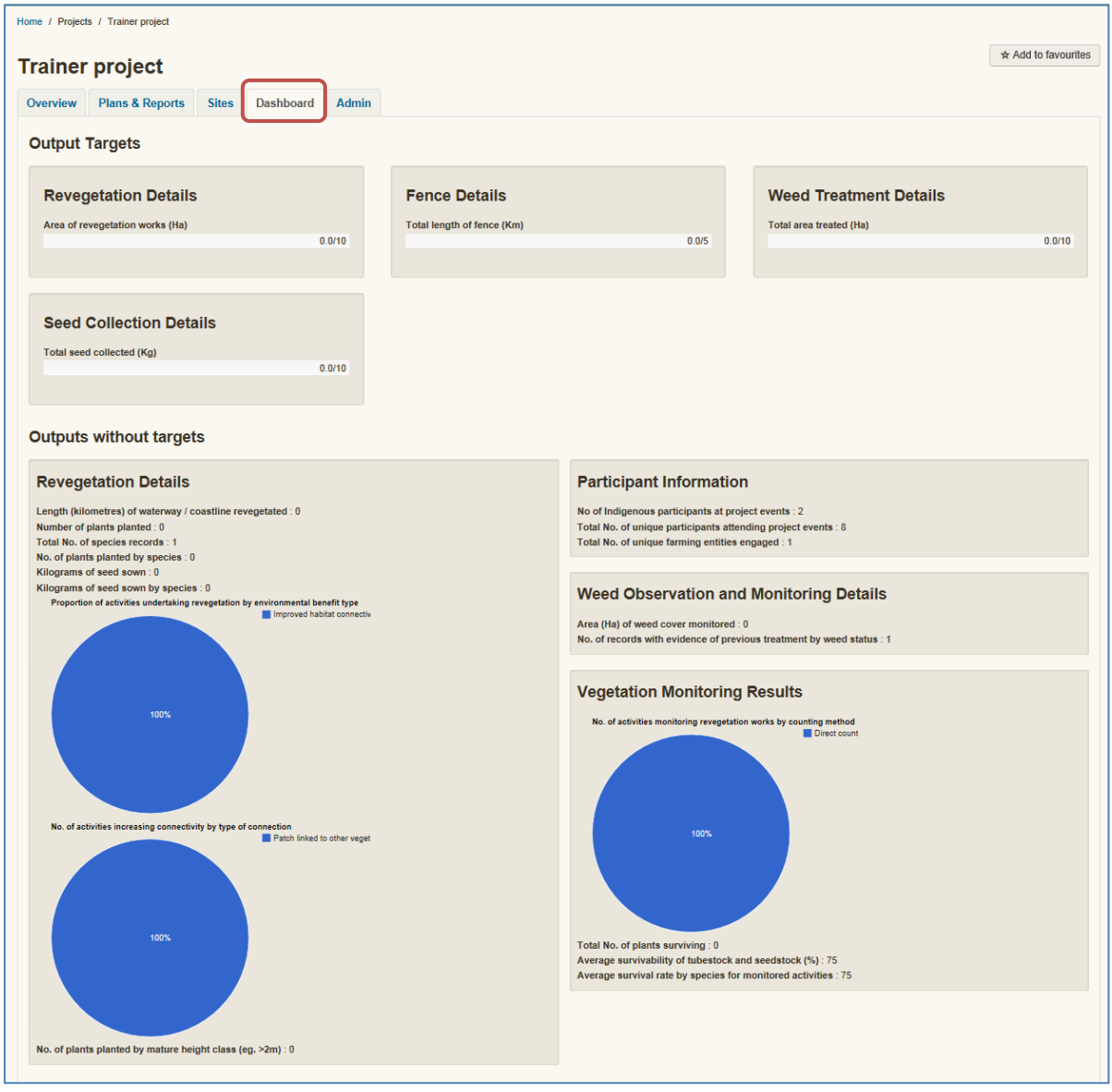


- **Dashboard** (project level) – provides a visual representation of data using graphs and tables to show the number of outputs the project will deliver and the progress the project has made toward these outputs.

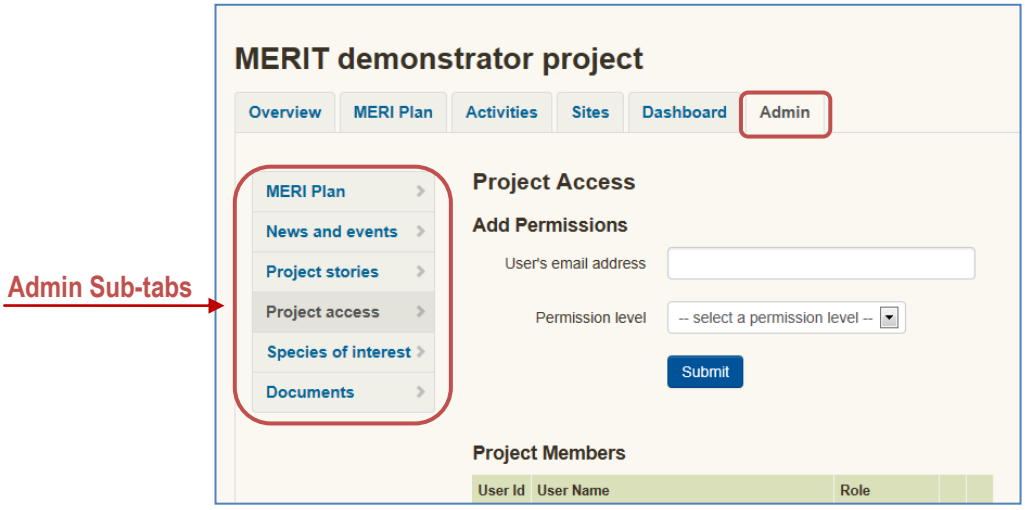
  Outputs are presented in two categories:

  - *Target-based outputs* – those which have a target measure specified in the MERI plan (see below the activity schedule); and
  - *Non-target outputs* – those which aggregate useful data from the activity forms to highlight some achievements of the project and contribute to Departmental programme reporting requirements.

  The project dashboard is automatically generated from the activity forms and total project outputs provided in the project's MERI plan (see Information Sheet 5).

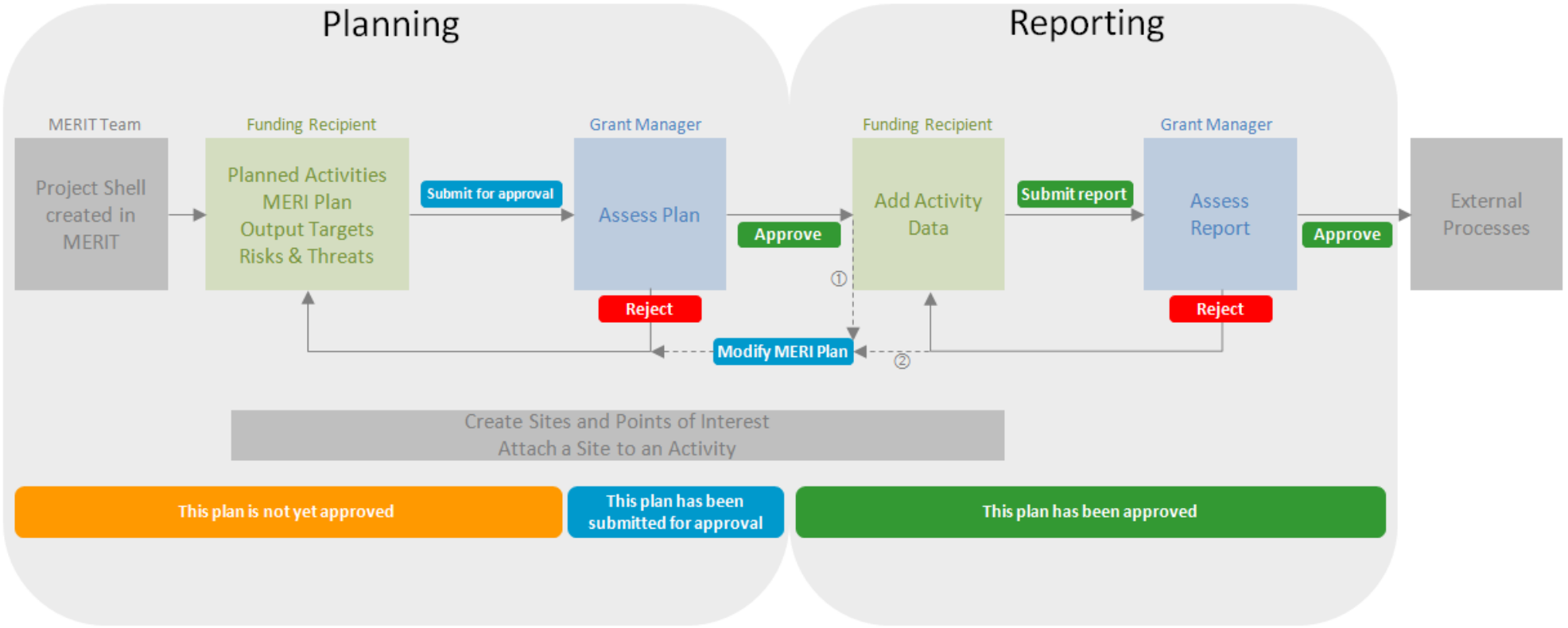

Home / Projects / Trainer project
Trainer project
Add to favourites
Overview
Plans & Reports
Sites
Dashboard
Admin
Output Targets
Revegetation Details
Area of revegetation works (Ha)
0.0/10
Fence Details
Total length of fence (Km)
0.0/5
Weed Treatment Details
Total area treated (Ha)
0.0/10
Seed Collection Details
Total seed collected (Kg)
0.0/10
Outputs without targets
Revegetation Details
Length (kilometres) of waterway / coastline revegetated : 0
Number of plants planted : 0
Total No. of species records : 1
No. of plants planted by species : 0
Kilograms of seed sown : 0
Kilograms of seed sown by species : 0
Proportion of activities undertaking revegetation by environmental benefit type
Improved habitat connectiv
100%
No. of activities increasing connectivity by type of connection
Patch linked to other veget
100%
No. of plants planted by mature height class (eg. >2m) : 0
Participant Information
No of Indigenous participants at project events : 2
Total No. of unique participants attending project events : 8
Total No. of unique farming entities engaged : 1
Weed Observation and Monitoring Details
Area (Ha) of weed cover monitored : 0
No. of records with evidence of previous treatment by weed status : 1
Vegetation Monitoring Results
No. of activities monitoring revegetation works by counting method
Direct count
100%
Total No. of plants surviving : 0
Average survivability of tubestock and seedstock (%) : 75
Average survival rate by species for monitored activities : 75

- **Admin** (Administrators only)



Sub-tab	Function
MERI Plan	Where Administrators can edit information appearing in the MERI Plan tab.
News and events	Basic word processing platform, where Administrators can promote their project activities. Displayed on the Project Overview tab.
Project stories	Basic word processing platform, where Administrators can promote their project achievements. Displayed on the Project Overview tab.
Project access	Where Administrators can add users to a project.
Species of interest	Where Administrators can create a species list for their project. This function aims to reduce the list of candidate species, in the species look-up function on forms, to only those that are applicable to the project.
Documents	Where Administrators can attach documents (Word, Excel, PDFs), sound bytes, videos and photos to a project. Administrators can nominate if the document/photo is publicly available – appears in the Project Overview. You can also select some photos to be the "main project image" and these will display more prominently on the Overview Page. **NB: Photos containing sensitive information (i.e. people) must not be publicly available unless you have permission to do so**

MERIT Process



① If an approved plan requires amending, contact the Grant Manager to enable modification of the MERI Plan. Edit the plan and resubmit for approval.

② If a submitted report is rejected because the plan requires editing (e.g. an activity form has been omitted), the Grant Manager will enable modification of the MERI Plan. Edit the plan and resubmit for approval. Once the plan is approved, add/amend activity data and resubmit the report for approval.

KEYS TO A GOOD PROJECT IN MERIT

The value of MERIT is intrinsicly linked to the quality (not necessarily quantity) of data it holds. Incorrect or incomplete project information compromises subsequent reports and narratives.

Project Plan

1. The list of planned activities must make sense, occur in a logical order, capture the output targets committed to in the application form and paint the whole picture (baseline data collection, preparation, maintenance, post-impact data collection).

2. You can aggregate multiple activities of the same type into one form **where appropriate**, and enter specific details into the activity description. Note that it may not be appropriate to aggregate monitoring activities that contain species lists, as the species data will become meaningless if captured across multiple sites. Many activity forms contain 'nested tables' where you can add extra rows if there is more than one type of that activity occuring in that stage. For example, if a funding recipient is planning a training session, field day and workshop in the same stage, then they could add one 'Community Participation and Engagement' activity form to their list of planned activities. When it comes time to report, the recipient can add one row in the 'Event Details' box for each event. Refer to the MERIT Ready Reckoner for a list of activities that contain nested tables.

3. Ensure you have selected the activity form that best represents what you are undertaking in the field. Feedback/queries to the MERIT inbox indicate that using the wrong activity form (and subsequently being asked for irrelevant data) is a common error and a high source of frustration for funding recipients. The MERIT Ready Reckoner, MERIT Schema and Activity Family Tree documents will help you decide which activity form to add to your list of planned activities.

4. Does the project plan include implementation or 'doing' activities? These are actions that deliver the project outputs (e.g. area of revegetation completed) and outcomes (e.g. improvement in vegetation condition). This data is compared to the funding agreement (output targets) to justify payments and provides an audit trail of compliance. Look at the Output Targets table at the bottom of the activities list – if there are no output targets, there are no 'doing' activities in the list.

Project Report

1. Ensure that the the data entered into the activity form adequately records achievement against any targets.

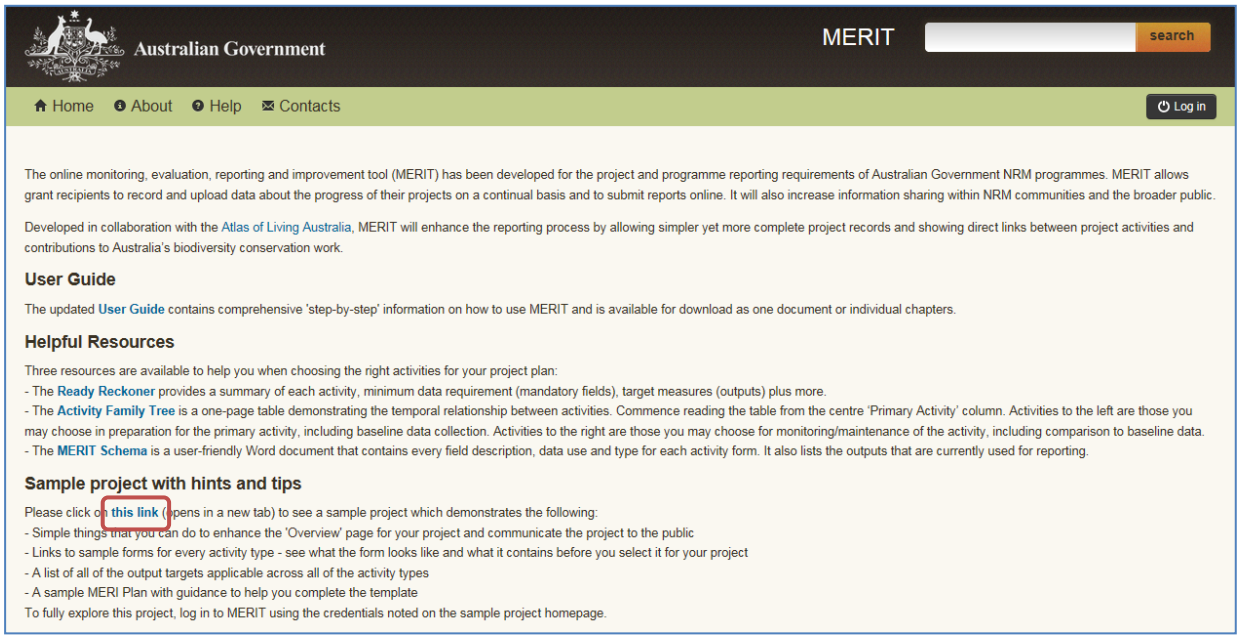
2. Ensure that a site has been assigned to each ‘doing’ activity (implementation actions, assessment/monitoring actions and training actions). Data that has spatial and textual accuracy is more useful for analysis and informing both management and investment decisions.

3. Ensure that you provide evidence that targets have been achieved. This could be as simple as a comprehensively completed activity form and inclusion of photopoint photos showing before and after comparisons. Evidence may also be in the form of before and after survey information or monitoring activities. For example, if a project aims to improve water quality, you would want to see a ‘Water Quality Survey’ form before and after the ‘impact’ activity.

4. If you are attaching a supplementary document to your project as part of your stage report, consider whether the information could be captured in an activity form. Recording great outcomes in attachments is the equivalent to paper reporting – it gets filed and the data does not contribute to your overall project outputs (dashboard). For example, if an attachment demonstrates a threatened bird species has now been observed at the site, it should trigger a discussion with your Departmental grant manager about including a ‘Fauna Survey’ form in the project. It will capture the observation as an outcome and enable it to be incorporated into broader reporting, as well as becoming an occurrence record in the Atlas of Living Australia where it is used for research and better understanding what is happening to our biodiversity.

TOOLS TO HELP

MERIT Demonstrator Project – this project has been set up in the test environment (https://fieldcapture-test.ala.org.au) so that users can experience and explore the range of activity forms currently available. Users will need to log in with the credentials noted on the overview page in order to view the project. Search for 'MERIT' in the search tool, click on the sample project link on the MERIT homepage (see below graphic) or use the following link: https://fieldcapture-test.ala.org.au/project/index/8b87b9d5-fc24-4d6f-b526-bf8aef4a8754.


Australian Government
MERIT
search
Home
About
Help
Contacts
Log in
The online monitoring, evaluation, reporting and improvement tool (MERIT) has been developed for the project and programme reporting requirements of Australian Government NRM programmes. MERIT allows grant recipients to record and upload data about the progress of their projects on a continual basis and to submit reports online. It will also increase information sharing within NRM communities and the broader public.
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance the reporting process by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.
User Guide
The updated User Guide contains comprehensive 'step-by-step' information on how to use MERIT and is available for download as one document or individual chapters.
Helpful Resources
Three resources are available to help you when choosing the right activities for your project plan:
- The Ready Reckoner provides a summary of each activity, minimum data requirement (mandatory fields), target measures (outputs) plus more.
- The Activity Family Tree is a one-page table demonstrating the temporal relationship between activities. Commence reading the table from the centre 'Primary Activity' column. Activities to the left are those you may choose in preparation for the primary activity, including baseline data collection. Activities to the right are those you may choose for monitoring/maintenance of the activity, including comparison to baseline data.
- The MERIT Schema is a user-friendly Word document that contains every field description, data use and type for each activity form. It also lists the outputs that are currently used for reporting.
Sample project with hints and tips
Please click on this link (opens in a new tab) to see a sample project which demonstrates the following:
- Simple things that you can do to enhance the 'Overview' page for your project and communicate the project to the public
- Links to sample forms for every activity type - see what the form looks like and what it contains before you select it for your project
- A list of all of the output targets applicable across all of the activity types
- A sample MERI Plan with guidance to help you complete the template
To fully explore this project, log in to MERIT using the credentials noted on the sample project homepage.

MERIT Schema – Word document that contains every field description, data use and type for each activity form. It also lists the outputs that are currently used for reporting. The Schema can be accessed from the Project Documents on the *MERIT Demonstrator Project* overview page. For those interested in the technical details behind the MERIT application, particularly those wishing to interoperate their local systems with MERIT, an online schema and application programming interface (API) is available at http://ecodata.ala.org.au/documentation/index.

MERIT Ready Reckoner – a three page summary table of each activity, minimum data requirement (mandatory fields), target measures (outputs) plus more. The Ready Reckoner can be accessed from the Project Documents on the *MERIT Demonstrator Project* overview page or via the MERIT resources page on the National Landcare Programme website.

Activity family tree – a one-page table demonstrating the temporal relationship between activities. Commence reading the table from the centre 'Primary Activity' column. Activities to the left are those you may choose in preparation for the primary activity, including baseline data collection. Activities to the right are those you may choose for monitoring/maintenance of

the activity, including comparison to baseline data. The Activity Family Tree can be accessed from the Project Documents on the *MERIT Demonstrator Project* overview page or via the MERIT resources page on the National Landcare Programme website.

MERIT FAQs and User Guides – links to this information can be found in the 'Help' section of MERIT. Click the **Help** icon on the main menu bar of the MERIT homepage. Alternatively, visit the MERIT resources page on the National Landcare Programme website.

MERIT Inbox - funding recipients should contact their Departmental grant manager in the first instance. Contact the MERIT team at merit@environment.gov.au for further technical support or to provide feedback on MERIT.

1. GETTING STARTED

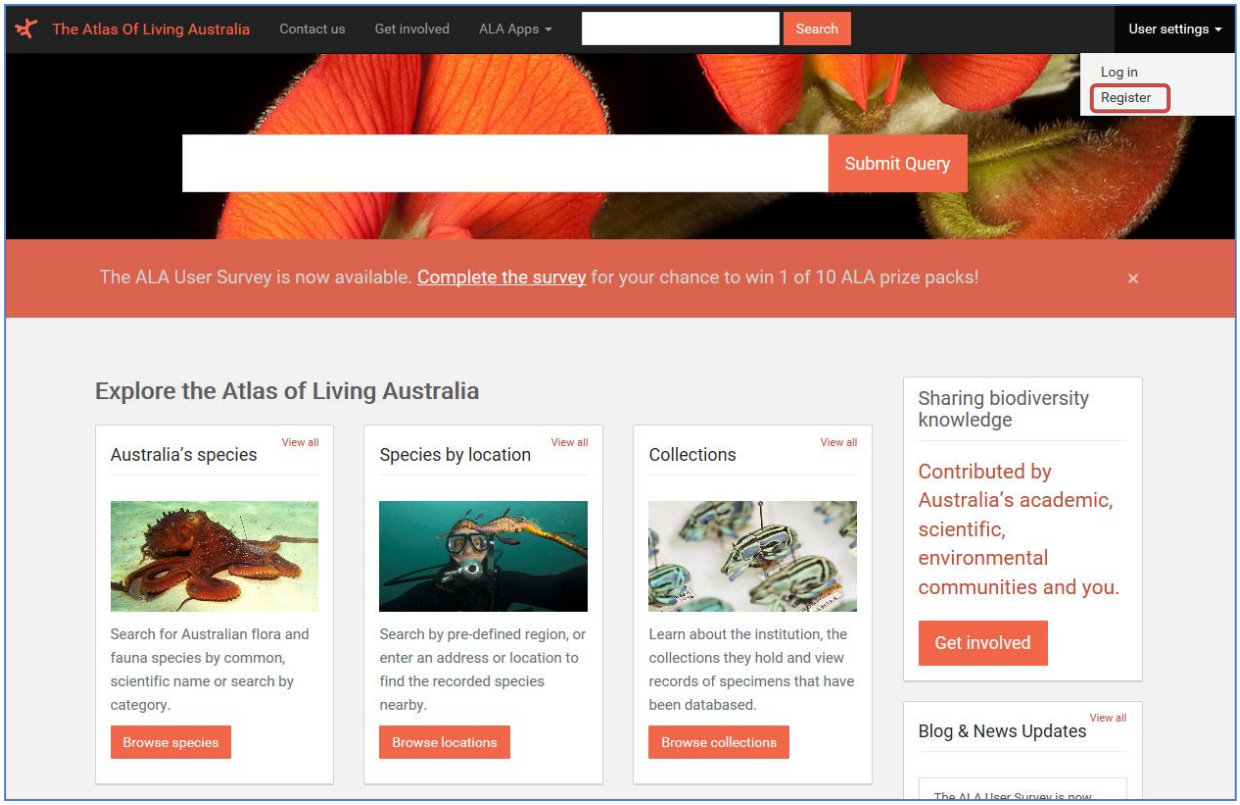
Access Level	☑ ADMIN	☑ EDITOR

All users must register with Atlas of Living Australia (ALA) in order to use MERIT.

1.1 Register with ALA

1. Go to Atlas of Living Australia www.ala.org.au.

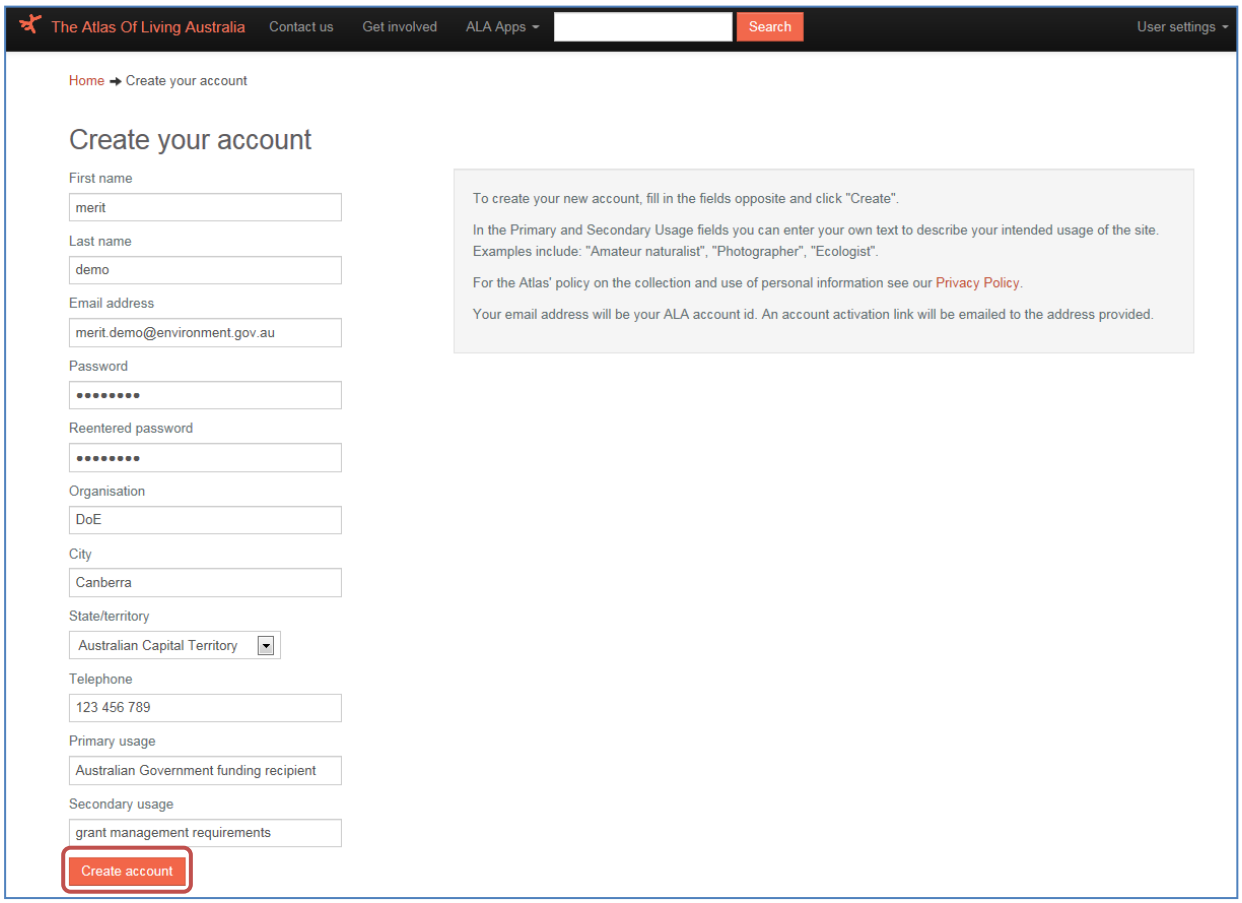
2. Click **User settings** located on the top right hand corner of the page. Then click **Register**.


The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Log in
Register
Submit Query
The ALA User Survey is now available. Complete the survey for your chance to win 1 of 10 ALA prize packs!
Explore the Atlas of Living Australia
Australia's species
View all
Search for Australian flora and fauna species by common, scientific name or search by category.
Browse species
Species by location
View all
Search by pre-defined region, or enter an address or location to find the recorded species nearby.
Browse locations
Collections
View all
Learn about the institution, the collections they hold and view records of specimens that have been databased.
Browse collections
Sharing biodiversity knowledge
Contributed by Australia's academic, scientific, environmental communities and you.
Get involved
Blog & News Updates
View all

3. The *Create your account* page opens.

4. Complete the information requested. Your password must be at least 8 characters. In the primary and secondary usage fields you can enter 'Australian Government funding recipient', 'grant management requirements'.

5. Click on the **Create account** button at the bottom of the page.


The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Home ➔ Create your account
Create your account
First name
merit
Last name
demo
Email address
merit.demo@environment.gov.au
Password
Reentered password
Organisation
DoE
City
Canberra
State/territory
Australian Capital Territory
Telephone
123 456 789
Primary usage
Australian Government funding recipient
Secondary usage
grant management requirements
Create account
To create your new account, fill in the fields opposite and click "Create".
In the Primary and Secondary Usage fields you can enter your own text to describe your intended usage of the site. Examples include: "Amateur naturalist", "Photographer", "Ecologist".
For the Atlas' policy on the collection and use of personal information see our Privacy Policy.
Your email address will be your ALA account id. An account activation link will be emailed to the address provided.

6. An email will be sent to your mail inbox from the Atlas of Living Australia.

Check your junk email folder if you haven't received an email within 24 hours. Contact the MERIT team at merit@environment.gov.au if you are having difficulties.

7. To activate your account, click on the link in the email and follow the instructions provided.

8. You are now registered with ALA.

9. Advise the relevant contact (see below) that you have registered with ALA and they will add you to the project's list of members/users:

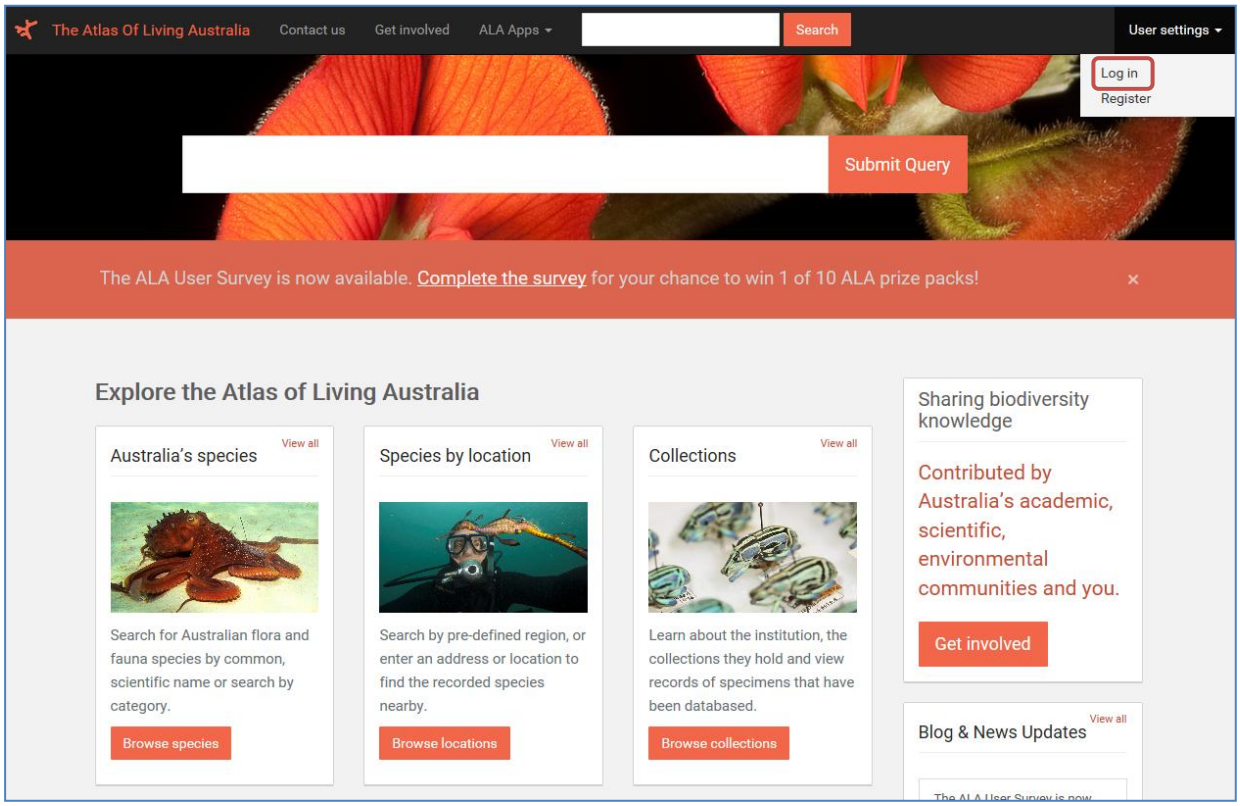
a. If you require Admin access, contact your Departmental grant manager

b. If you require Editor access, contact the Administrator for the project (within your organisation)

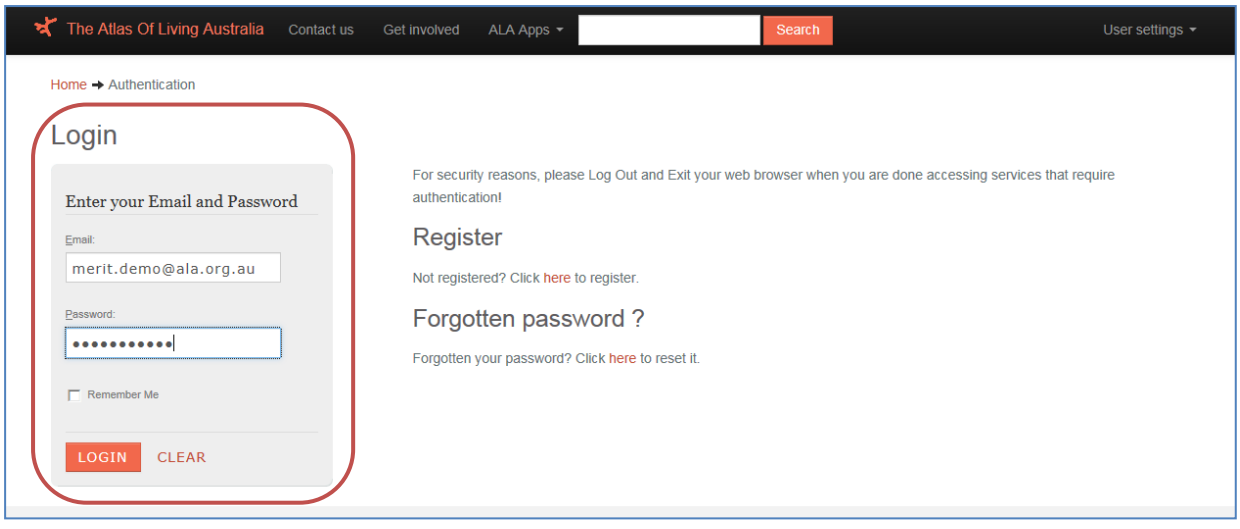
1.2 Edit ALA profile

1. Go to Atlas of Living Australia www.ala.org.au.

2. Click **User settings** then **Login** located on the top right hand corner of the page.

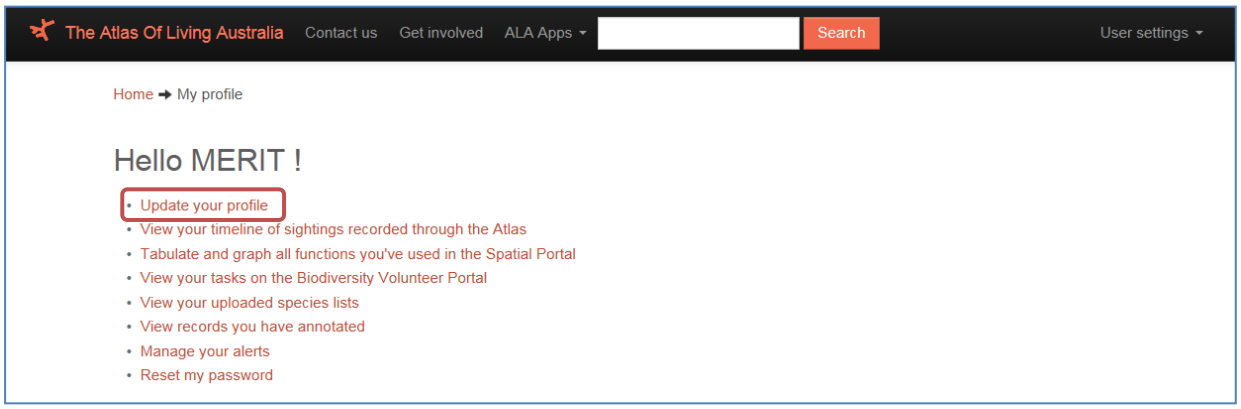

The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Log in
Register
Submit Query
The ALA User Survey is now available. Complete the survey for your chance to win 1 of 10 ALA prize packs!
Explore the Atlas of Living Australia
Australia's species
View all
Search for Australian flora and fauna species by common, scientific name or search by category.
Browse species
Species by location
View all
Search by pre-defined region, or enter an address or location to find the recorded species nearby.
Browse locations
Collections
View all
Learn about the institution, the collections they hold and view records of specimens that have been databased.
Browse collections
Sharing biodiversity knowledge
Contributed by Australia's academic, scientific, environmental communities and you.
Get involved
Blog & News Updates
View all

3. The ALA login page will open. Enter the email address and password you used to register with ALA. Click **Login**.

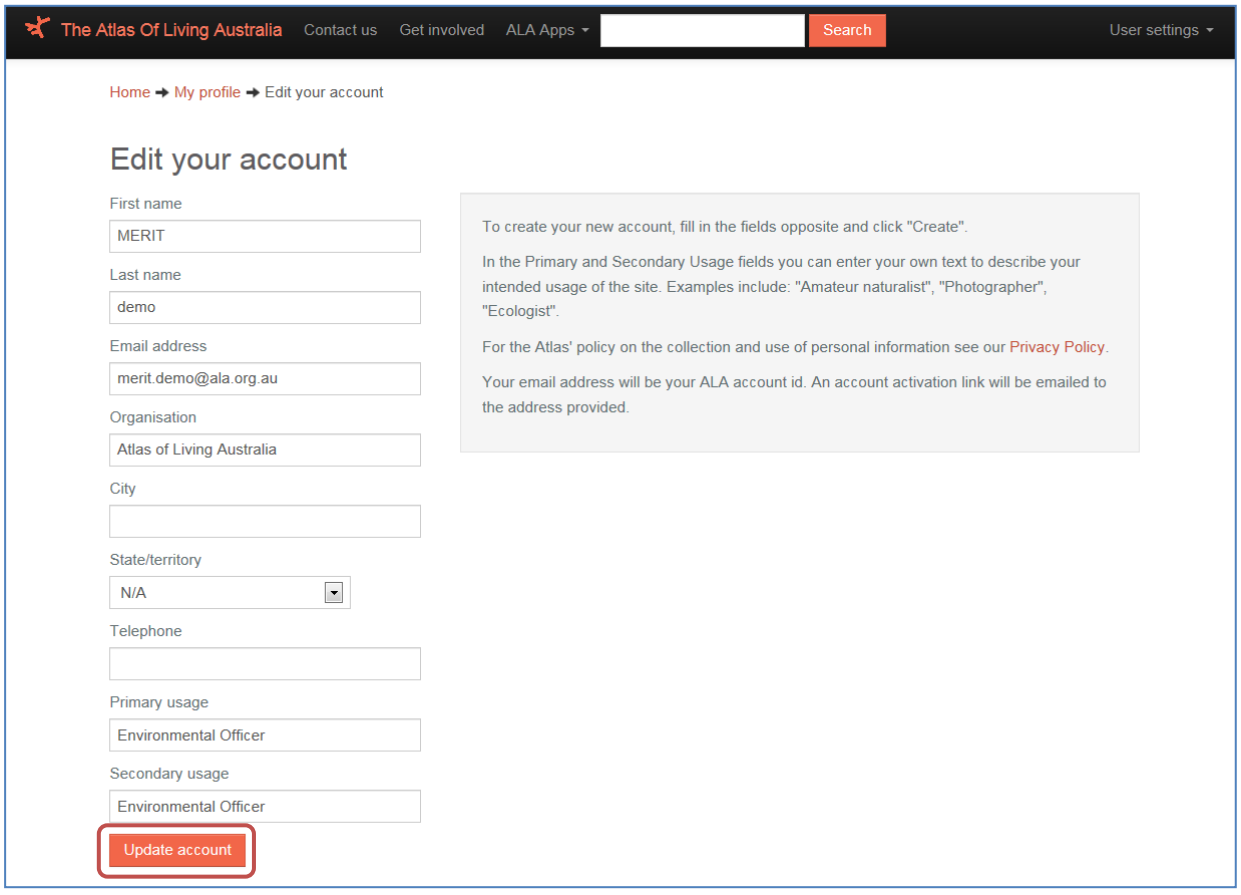


4.You will be taken back to the ALA homepage. Click **User Settings** then **My Profile.**

5. Your ALA Profile Home Page will open. Click the **Update your profile** link.


The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Home ➜ My profile
Hello MERIT !
Update your profile
View your timeline of sightings recorded through the Atlas
Tabulate and graph all functions you've used in the Spatial Portal
View your tasks on the Biodiversity Volunteer Portal
View your uploaded species lists
View records you have annotated
Manage your alerts
Reset my password

5.This page displays the information you used to register with ALA. Edit the information as necessary and click **Update account** at the bottom of the page.


The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Home ➜ My profile ➜ Edit your account
Edit your account
First name
MERIT
Last name
demo
Email address
merit.demo@ala.org.au
Organisation
Atlas of Living Australia
City
State/territory
N/A
Telephone
Primary usage
Environmental Officer
Secondary usage
Environmental Officer
Update account
To create your new account, fill in the fields opposite and click "Create".
In the Primary and Secondary Usage fields you can enter your own text to describe your intended usage of the site. Examples include: "Amateur naturalist", "Photographer", "Ecologist".
For the Atlas' policy on the collection and use of personal information see our Privacy Policy.
Your email address will be your ALA account id. An account activation link will be emailed to the address provided.

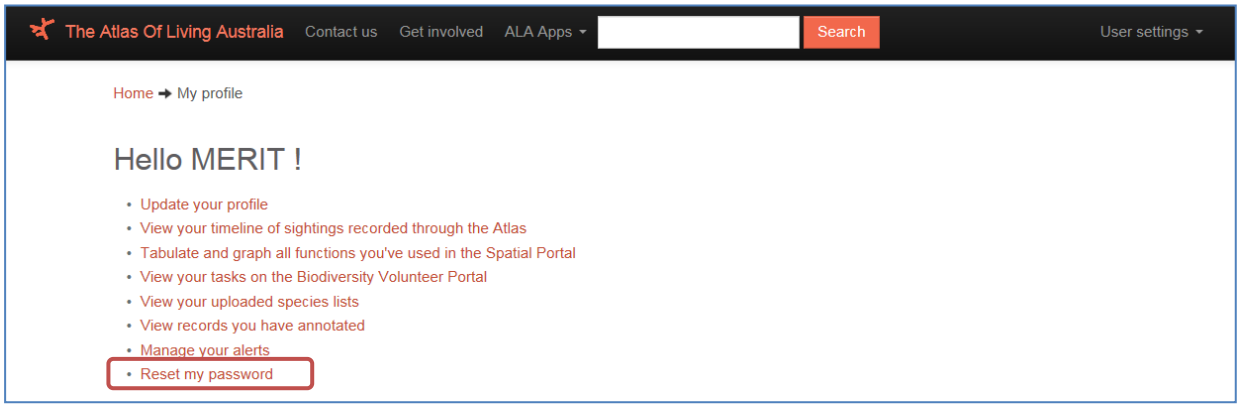
1.3 Edit ALA password

1. Go to Atlas of Living Australia www.ala.org.au.

2. Click **User settings** then **Login** located on the top right hand corner of the page.

3. The ALA login page will open. Enter the email address and password you used to register with ALA. Click **Login**.

4.Your ALA Profile Home Page will open. Click the **Reset my password** link.


The Atlas Of Living Australia
Contact us
Get involved
ALA Apps
Search
User settings
Home ➡ My profile
Hello MERIT !
Update your profile
View your timeline of sightings recorded through the Atlas
Tabulate and graph all functions you've used in the Spatial Portal
View your tasks on the Biodiversity Volunteer Portal
View your uploaded species lists
View records you have annotated
Manage your alerts
Reset my password

5. Type the email address you used to register with ALA and the security letters you see on the screen. Click **Send Password Reset Link**.

6. A one-time link will be emailed to your registered email address, allowing you to enter a new password. The link will be valid for 48 hours.

Check your junk email folder if you haven't received an email within 24 hours. Contact the MERIT team at merit@environment.gov.au if you are having difficulties.

1.4 Log in to MERIT

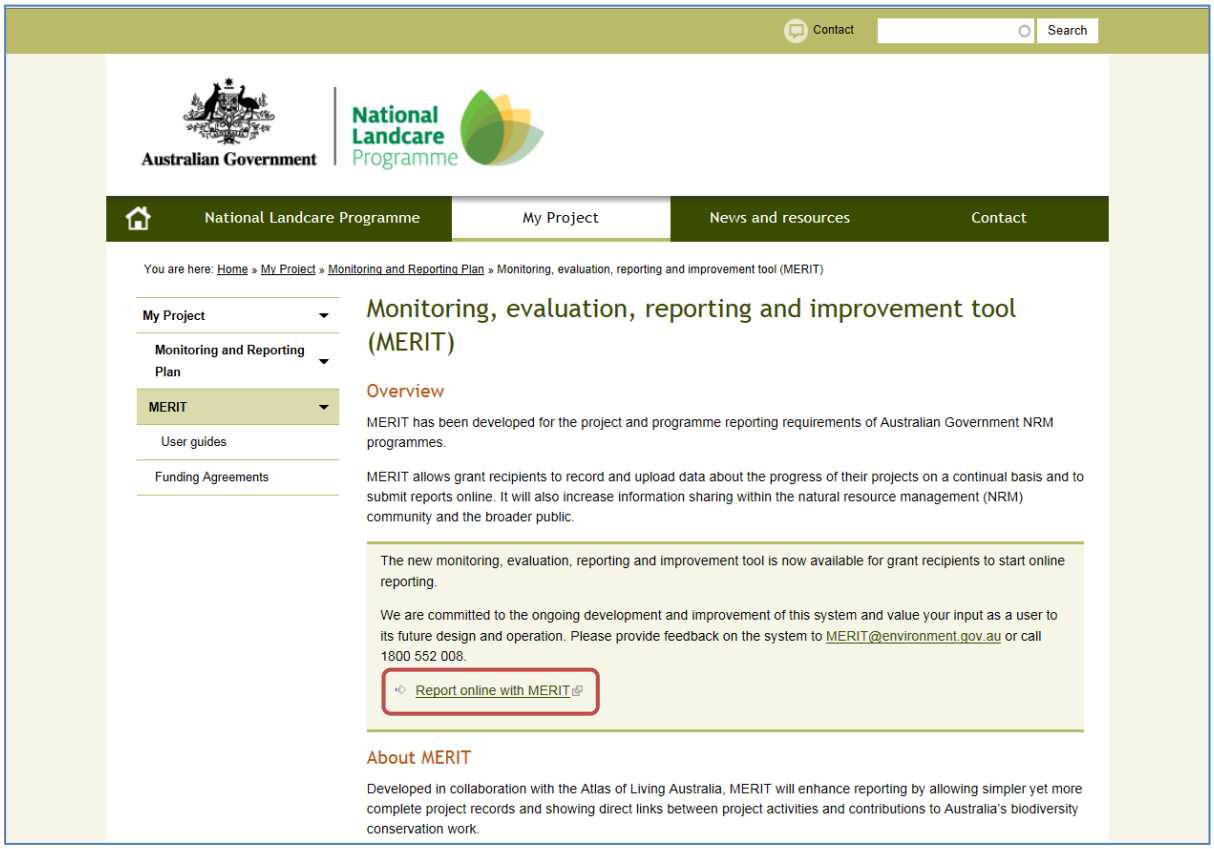
Once you have registered and have access to your project/s, you can log in and start using MERIT.

1. There are three ways to access the MERIT portal.

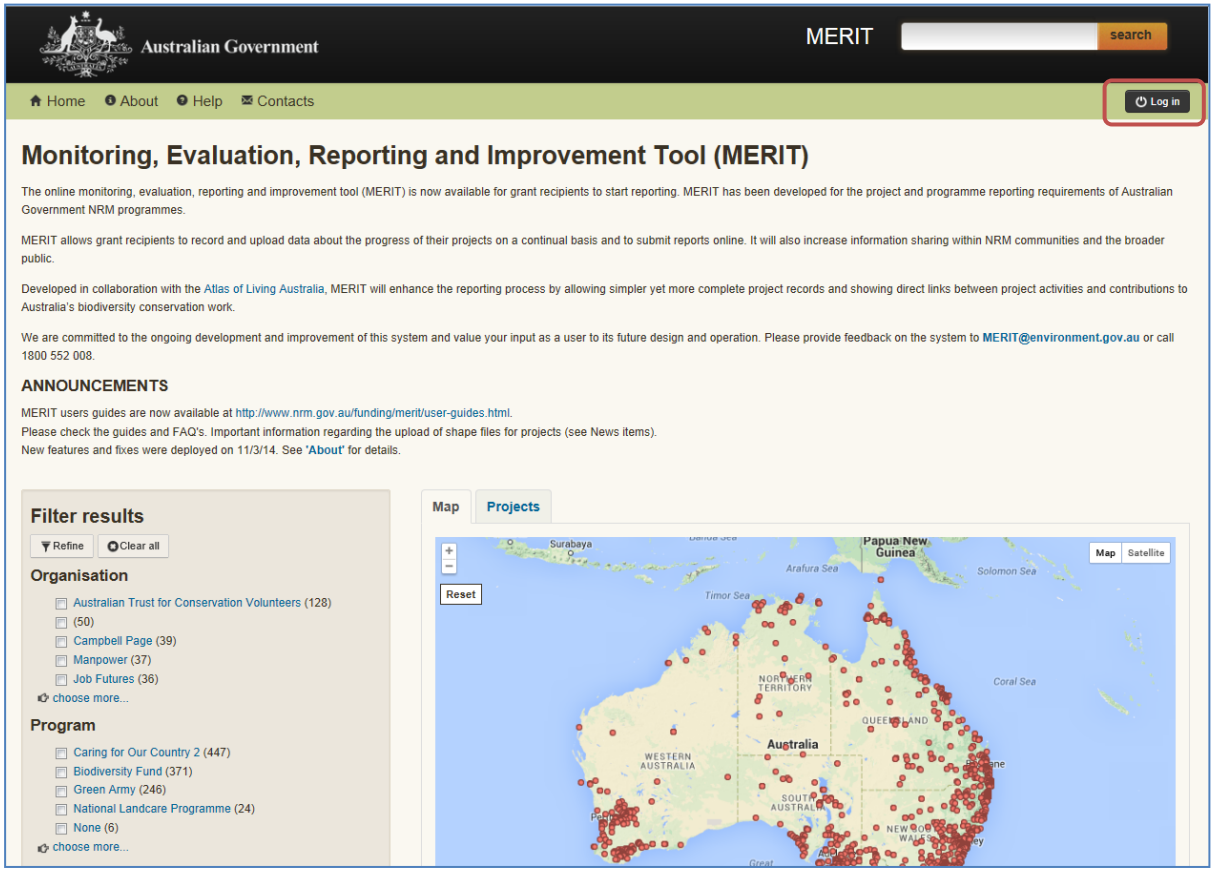
    a. Visit https://fieldcapture.ala.org.au/

    b. Click on the link to the MERIT home page under 'ALA Apps' on the ALA website https://ala.org.au

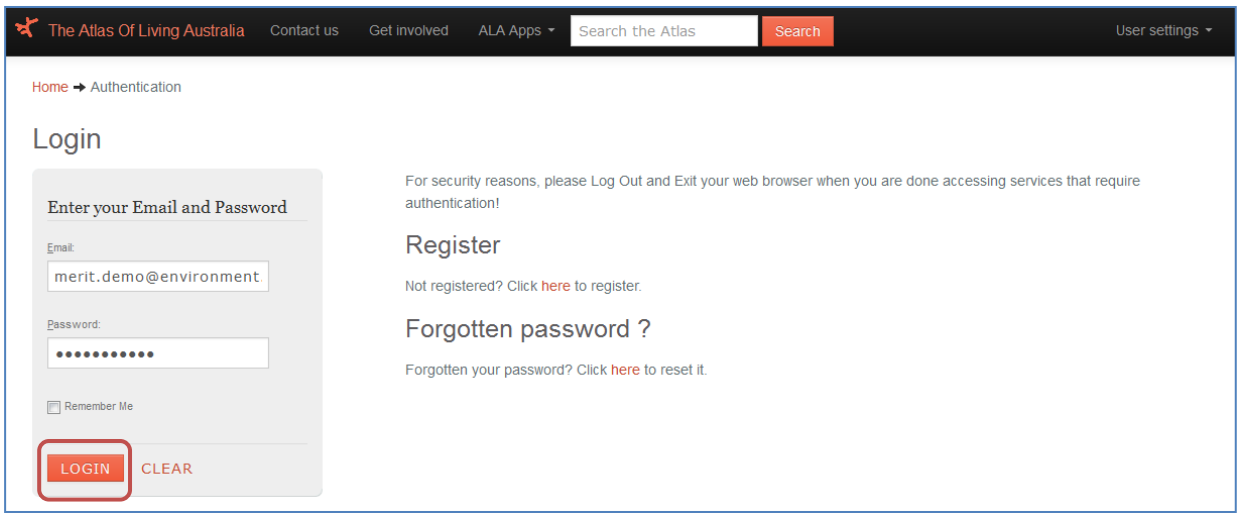
    c. Click on the link to the MERIT home page through the website http://www.nrm.gov.au/my-project/monitoring-and-reporting-plan/merit.


Contact
Search
Australian Government
National Landcare Programme
National Landcare Programme
My Project
News and resources
Contact
You are here: Home » My Project » Monitoring and Reporting Plan » Monitoring, evaluation, reporting and improvement tool (MERIT)
My Project
Monitoring and Reporting Plan
MERIT
User guides
Funding Agreements
Monitoring, evaluation, reporting and improvement tool (MERIT)
Overview
MERIT has been developed for the project and programme reporting requirements of Australian Government NRM programmes.
MERIT allows grant recipients to record and upload data about the progress of their projects on a continual basis and to submit reports online. It will also increase information sharing within the natural resource management (NRM) community and the broader public.
The new monitoring, evaluation, reporting and improvement tool is now available for grant recipients to start online reporting.
We are committed to the ongoing development and improvement of this system and value your input as a user to its future design and operation. Please provide feedback on the system to MERIT@environment.gov.au or call 1800 552 008.
Report online with MERIT
About MERIT
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance reporting by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.

2. Click **Login** on the MERIT home page.

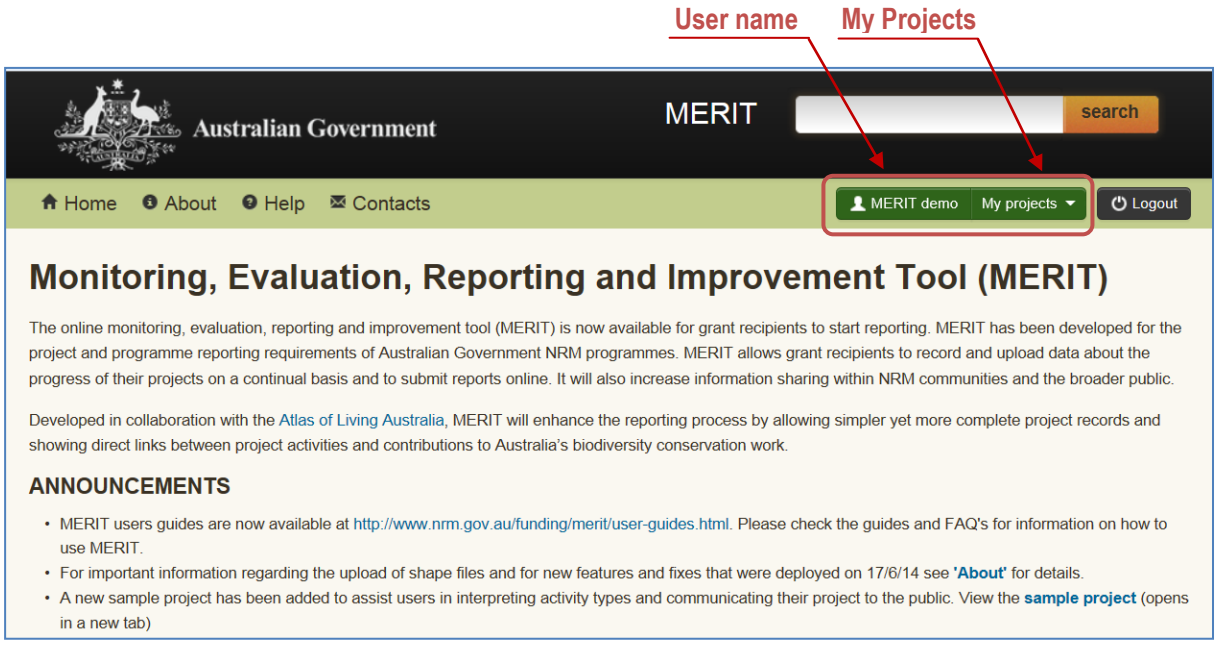

Australian Government
MERIT
search
Home
About
Help
Contacts
Log in
Monitoring, Evaluation, Reporting and Improvement Tool (MERIT)
The online monitoring, evaluation, reporting and improvement tool (MERIT) is now available for grant recipients to start reporting. MERIT has been developed for the project and programme reporting requirements of Australian Government NRM programmes.
MERIT allows grant recipients to record and upload data about the progress of their projects on a continual basis and to submit reports online. It will also increase information sharing within NRM communities and the broader public.
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance the reporting process by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.
We are committed to the ongoing development and improvement of this system and value your input as a user to its future design and operation. Please provide feedback on the system to MERIT@environment.gov.au or call 1800 552 008.
ANNOUNCEMENTS
MERIT users guides are now available at http://www.nrm.gov.au/funding/merit/user-guides.html.
Please check the guides and FAQ's. Important information regarding the upload of shape files for projects (see News items).
New features and fixes were deployed on 11/3/14. See 'About' for details.
Filter results
Refine
Clear all
Organisation
Australian Trust for Conservation Volunteers (128)
(50)
Campbell Page (39)
Manpower (37)
Job Futures (36)
choose more...
Program
Caring for Our Country 2 (447)
Biodiversity Fund (371)
Green Army (246)
National Landcare Programme (24)
None (6)
choose more...
Map
Projects
Reset
Map
Satellite
Australia

3. The ALA login page will open. Enter the email address and password you used to register with ALA. Click **Login**.



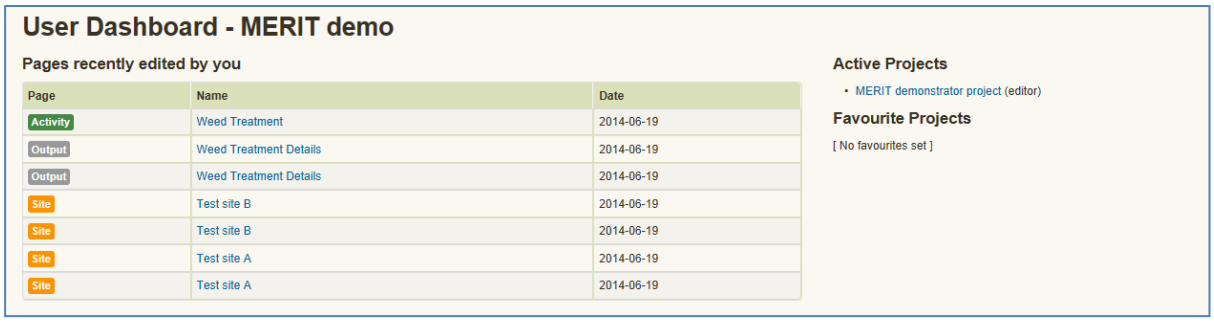
If you have forgotten your password please refer to the forgotten password section below.

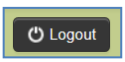
4. You will be taken to the MERIT home page. Your username appears in the menu bar, and projects you have access to are listed in the 'My projects' drop down box.


User name
My Projects
Australian Government
MERIT
search
Home
About
Help
Contacts
MERIT demo
My projects
Logout
Monitoring, Evaluation, Reporting and Improvement Tool (MERIT)
The online monitoring, evaluation, reporting and improvement tool (MERIT) is now available for grant recipients to start reporting. MERIT has been developed for the project and programme reporting requirements of Australian Government NRM programmes. MERIT allows grant recipients to record and upload data about the progress of their projects on a continual basis and to submit reports online. It will also increase information sharing within NRM communities and the broader public.
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance the reporting process by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.
ANNOUNCEMENTS
MERIT users guides are now available at http://www.nrm.gov.au/funding/merit/user-guides.html. Please check the guides and FAQ's for information on how to use MERIT.
For important information regarding the upload of shape files and for new features and fixes that were deployed on 17/6/14 see 'About' for details.
A new sample project has been added to assist users in interpreting activity types and communicating their project to the public. View the sample project (opens in a new tab)

Save https://fieldcapture.ala.org.au/ as a bookmark in your internet browser for faster access to MERIT.

5. Clicking on the **User Name** button opens the User Dashboard. This lists pages recently edited by you, your Active Projects and Favourite Projects.



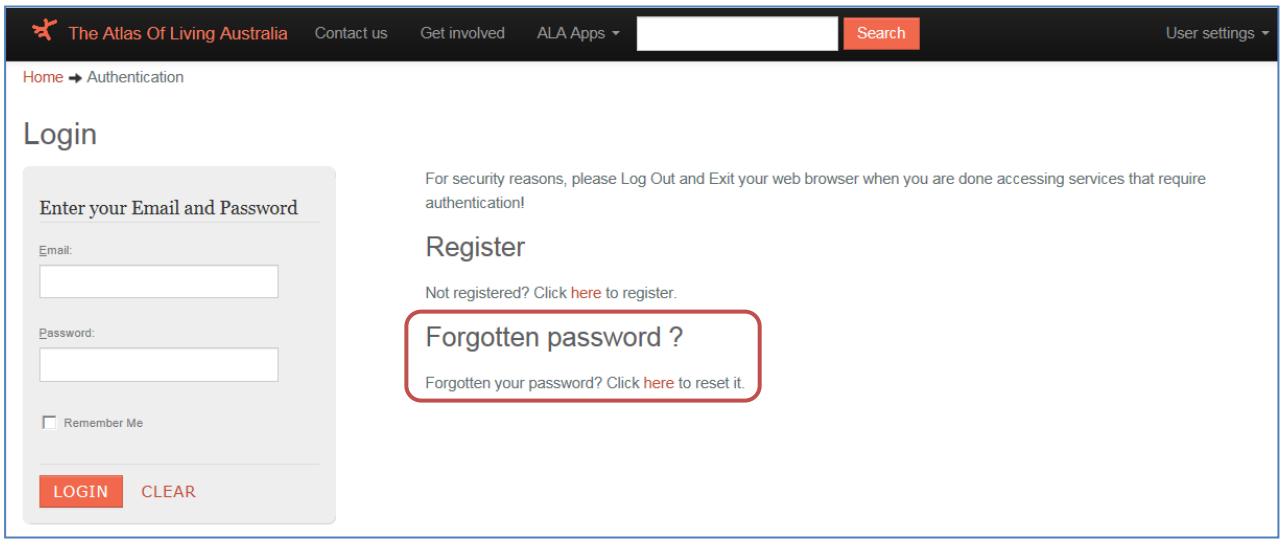
6. For security reasons, please log out at the end of each session by clicking on the 

button on the MERIT home page.

1.5 Forgotten password

If you have forgotten your ALA password:

1. On the ALA login page (Section 1.4, Step 3) click the link under the heading ‘Forgotten password’.



2. Follow the instructions provided. A new password will be sent to your email inbox. Remember to check your junk email folder.

3. Once you have received your new password, you can continue with logging in, from Section 1.4, Step 3 using the new password provided.

If you have issues logging in, please call your Departmental grant manager on the Departmental Community Information Unit line 1800 552 008.

2. SEARCH FOR A PROJECT

Access Level ☑ ADMIN ☑ EDITOR ☑ PUBLIC

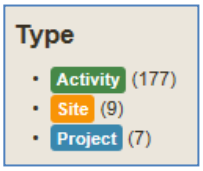
2.1 Using the 'Search' function

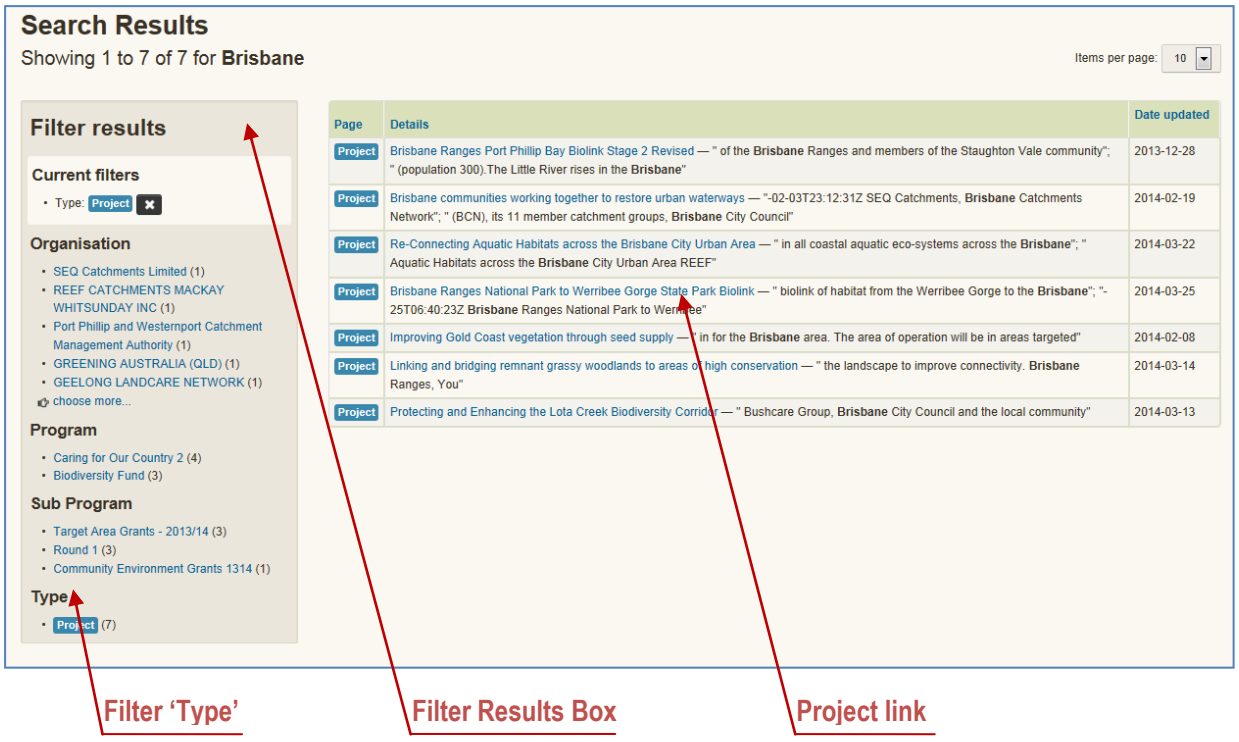
1. Open MERIT (https://fieldcapture.ala.org.au/).

2. Type your search term into the search tool.

3. Click **Search**. The search results will show all activities, sites and Projects/project descriptions that contain the search term.

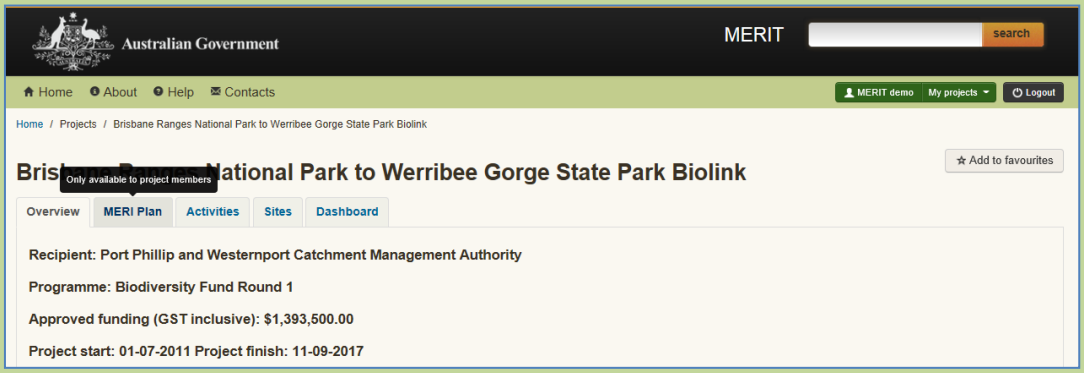
4. Scroll to the bottom of the Search Results page. Click on **Project**, under 'Type' in the filter results box. This filters the search results to only projects that contain the search term.




Search Results
Showing 1 to 7 of 7 for Brisbane
Items per page: 10
Filter results
Current filters
Type: Project
Organisation
SEQ Catchments Limited (1)
REEF CATCHMENTS MACKAY WHITSUNDAY INC (1)
Port Phillip and Westernport Catchment Management Authority (1)
GREENING AUSTRALIA (QLD) (1)
GEELONG LANDCARE NETWORK (1)
choose more...
Program
Caring for Our Country 2 (4)
Biodiversity Fund (3)
Sub Program
Target Area Grants - 2013/14 (3)
Round 1 (3)
Community Environment Grants 1314 (1)
Type
Project (7)
Page
Details
Date updated
Project
Brisbane Ranges Port Phillip Bay Biolink Stage 2 Revised — " of the Brisbane Ranges and members of the Staughton Vale community"; " (population 300).The Little River rises in the Brisbane"
2013-12-28
Project
Brisbane communities working together to restore urban waterways — "-02-03T23:12:31Z SEQ Catchments, Brisbane Catchments Network"; " (BCN), its 11 member catchment groups, Brisbane City Council"
2014-02-19
Project
Re-Connecting Aquatic Habitats across the Brisbane City Urban Area — " in all coastal aquatic eco-systems across the Brisbane"; " Aquatic Habitats across the Brisbane City Urban Area REEF"
2014-03-22
Project
Brisbane Ranges National Park to Werribee Gorge State Park Biolink — " biolink of habitat from the Werribee Gorge to the Brisbane"; "-25T06:40:23Z Brisbane Ranges National Park to Werribee"
2014-03-25
Project
Improving Gold Coast vegetation through seed supply — " in for the Brisbane area. The area of operation will be in areas targeted"
2014-02-08
Project
Linking and bridging remnant grassy woodlands to areas of high conservation — " the landscape to improve connectivity. Brisbane Ranges, You"
2014-03-14
Project
Protecting and Enhancing the Lota Creek Biodiversity Corridor — " Bushcare Group, Brisbane City Council and the local community"
2014-03-13
Filter 'Type'
Filter Results Box
Project link

5. Click on the project link to go to the project page.

The Overview tab is the only project information available to everyone. A user must login and have project access to view the additional project tabs (MERI Plan, Activities, Sites, Dashboard, Admin).



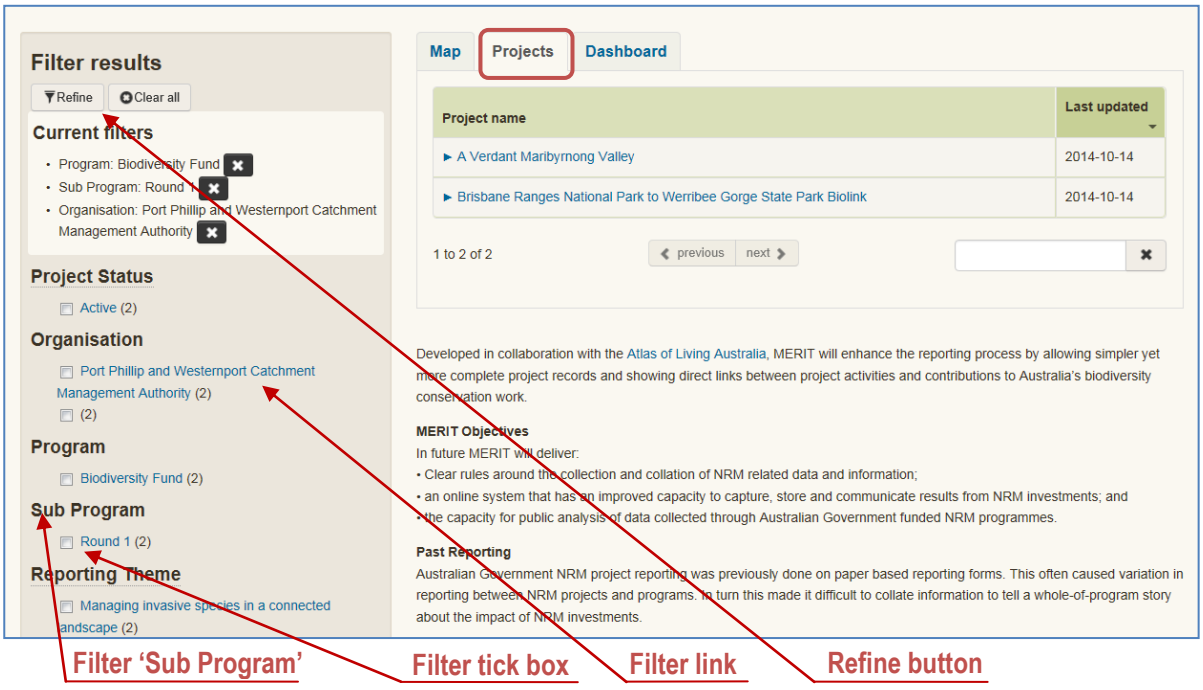
2.2 Using the 'Filter Results' function

1. Open the MERIT home page by clicking on the **Home** link on the menu bar.

2. Click the relevant filters in the 'Filter Results' box. For example, scroll to the 'Program' filter and click the 'Biodiversity Fund' link. The list of projects is automatically refined to those funded by the Biodivesity Fund programme. Next, scroll to the 'Sub Program' filter and click the 'Round 1' link. Then scroll to the 'Organisation' filter and click 'Port Phillip and Westernport CMA' link. You will need to click the 'choose more' link to open the full list of organisations. The list can be sorted alphabetically. If you want to select more than one filter at a time, click the relevant tick-boxes and click the

button at the top of the 'Filter Results' box.

Your search results on the **Project** tab will look something like this:


Filter results
Refine
Clear all
Current filters
Program: Biodiversity Fund
Sub Program: Round 1
Organisation: Port Phillip and Westernport Catchment Management Authority
Project Status
Active (2)
Organisation
Port Phillip and Westernport Catchment Management Authority (2)
(2)
Program
Biodiversity Fund (2)
Sub Program
Round 1 (2)
Reporting Theme
Managing invasive species in a connected landscape (2)
Map
Projects
Dashboard
Project name
Last updated
A Verdant Maribyrnong Valley
2014-10-14
Brisbane Ranges National Park to Werribee Gorge State Park Biolink
2014-10-14
1 to 2 of 2
previous
next
Developed in collaboration with the Atlas of Living Australia, MERIT will enhance the reporting process by allowing simpler yet more complete project records and showing direct links between project activities and contributions to Australia's biodiversity conservation work.
MERIT Objectives
In future MERIT will deliver:
• Clear rules around the collection and collation of NRM related data and information;
• an online system that has an improved capacity to capture, store and communicate results from NRM investments; and
• the capacity for public analysis of data collected through Australian Government funded NRM programmes.
Past Reporting
Australian Government NRM project reporting was previously done on paper based reporting forms. This often caused variation in reporting between NRM projects and programs. In turn this made it difficult to collate information to tell a whole-of-program story about the impact of NRM investments.
Filter 'Sub Program'
Filter tick box
Filter link
Refine button

3. ADD A USER TO A PROJECT

Access Level ☑ **ADMIN** ☒ **EDITOR**

Administrators are able to provide colleagues access (either administrator or editor) to project/s in MERIT.

User permission levels:

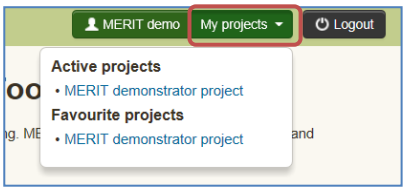
	View project information	Input and edit activity data	Input and edit plan data	Access Admin tab	Submit project data and reporting	Assign / edit access permissions
Editor	✓	✓	✓			
Administrator	✓	✓	✓	✓	✓	✓

All users need to register with ALA before they can use MERIT (see Information Sheet 1).

To add a user to your project:

1. Log in to MERIT.

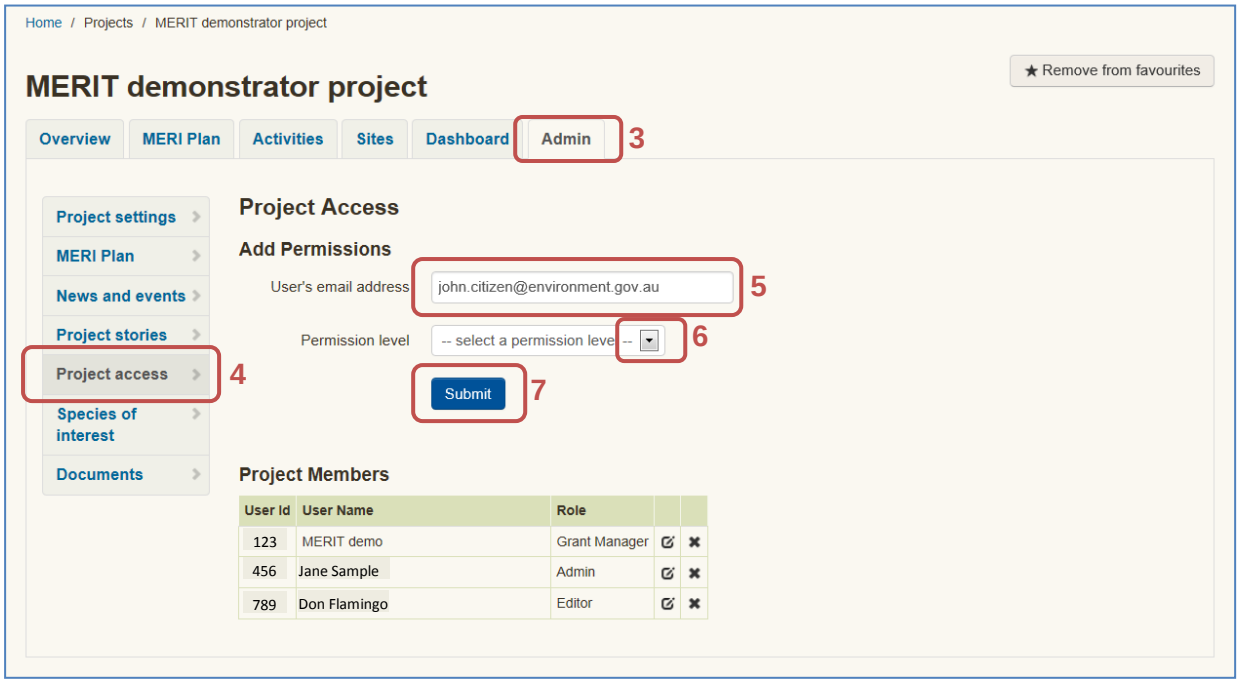
2. Click the **My Projects** button on the menu bar. Select the relevant project for which you would like to grant access.



3. Click the **Admin** tab on the Project home page.

4. Click **Project Access** sub tab on the left of the screen. A list of users who already have access to the project will be displayed.

5. Enter the user's email address.



6. From the drop down menu, choose the permission level you wish to give them (editor or admin).

7. Click **Submit**. The user will be added to the bottom of the list of Project Members.

8. Advise the user they have access to the project. The project will appear on the list when they click the ‘My Projects’ button on the home page.

4. CHANGE USER PERMISSION

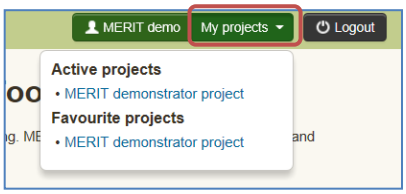
Access Level	☑ ADMIN	☒ EDITOR

As the administrator, you can change the permission level for people accessing your project. Or, due to staff changes, you may want to remove a user's access to a project.

To edit or remove user access:

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.

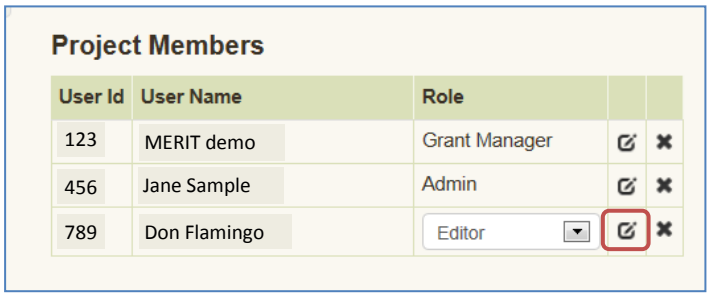


3. Click the **Admin** tab on the Project home page.

4. Click the **Project Access** sub tab on the left of the screen. A list of users who have access to the project will be displayed.

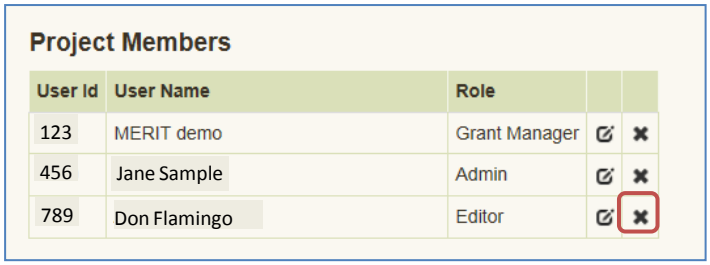
5. To change the permission level for an existing user, click the edit button next to their name. This displays a drop down menu under the 'Role' column.

6. From the drop down menu, choose the permission level you wish to give them (editor or admin).



7. Advise the user that you have changed their permission level. Now when they log in to MERIT, their access to the project will reflect the role you chose in Step 6 above.

8. To delete a project member, click the 'x' in the last column



If updated data is not displaying straight away, press the refresh button for your browser (e.g. F5 key for Google Chrome and Mozilla Firefox).

5. CREATE / EDIT A PROJECT PLAN

Phase	This plan is not yet approved		
Access Level	☑ **ADMIN**	☑ **EDITOR**	– Planned Activities List – Output Targets – Project Risks and Threats

Project shells are linked to the respective record in the Department's Grants Management System (GMS). Some shells may be pre-populated with project and activity information from the MERI plan that formed part of the grant application, while some shells may need to be populated by the funding recipient (administrator). If pre-populated, a funding recipient will (at a mimimum) need to 'proof-read' their project plan prior to submitting to their Departmental grant manager for approval.

A project plan in MERIT consists of five components:

1. Programme Logic (optional)
2. MERI Plan
3. Planned Activities
4. Output Targets
5. Project Risks and Threats

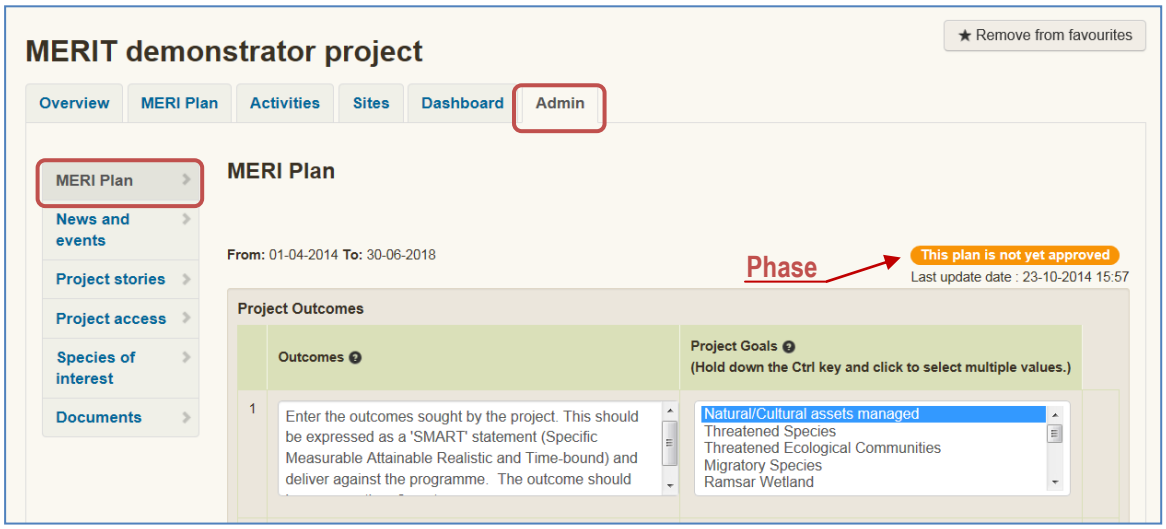
The purpose of the project plan is to:

1. clearly set out the intended outcomes and outputs of funded project/s and the project activities intended to achieve them; and
2. monitor progress and achievements through regular reporting against the plan which supports accountability and adaptive management.

Creating a project plan is completed by the funding recipient (administrator) and submitted to the Departmental grant manager for approval.

There are 3 phases for a project plan (displayed on the Admin/MERI Plan sub-tab):

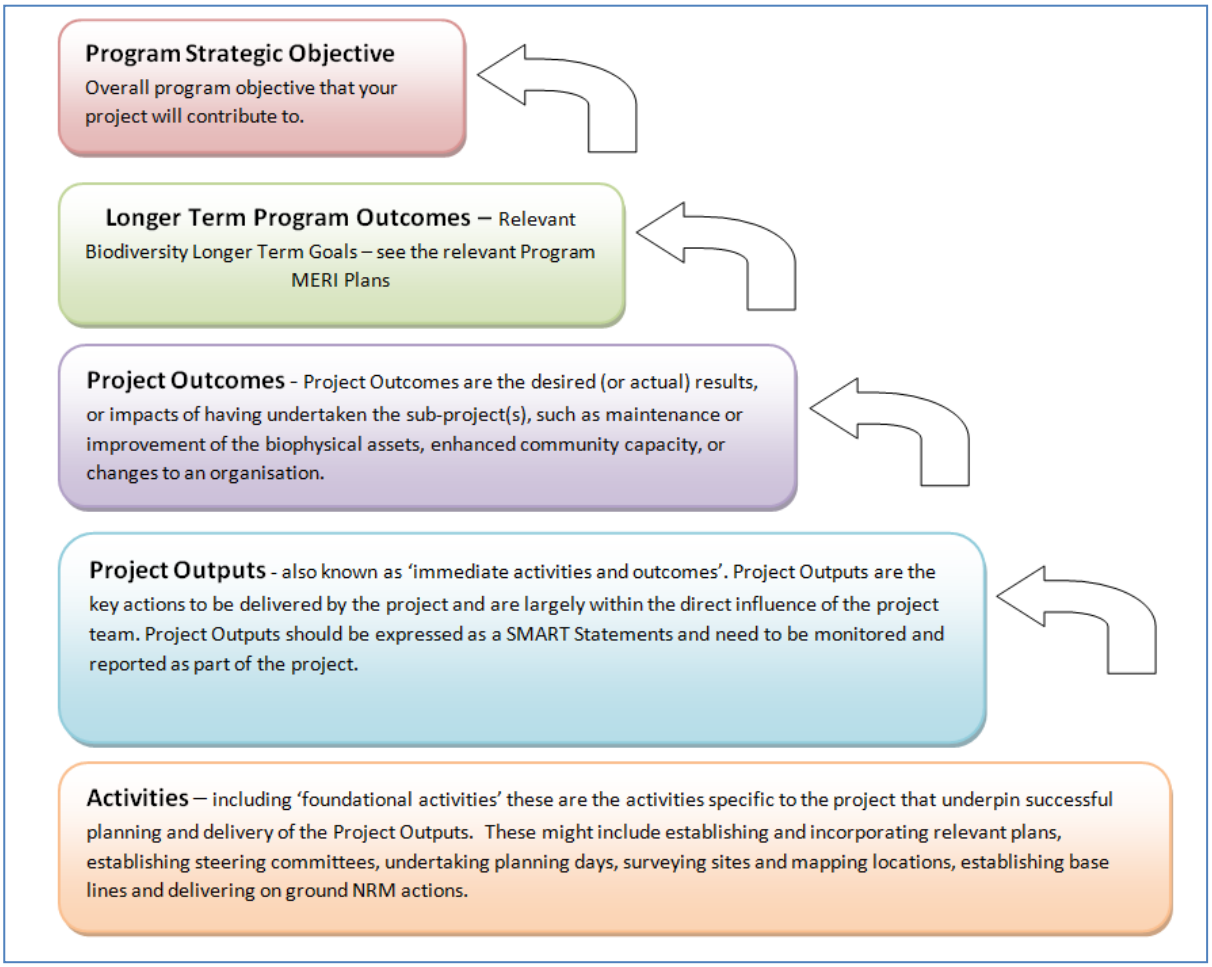
This plan is not yet approved	the project plan can be edited.
This plan has been submitted for approval	the project plan has been submitted but not yet approved by the Departmental grant manager. The project plan cannot be edited, nor can activity implementation data be recorded.
This plan has been approved	the project plan has been approved by the Departmental grant manager. The project plan cannot be edited. Data can be added to activity forms.



Projects cannot be edited if the plan has been submitted or approved (teal or green phase). If you need to edit a submitted or approved plan, contact your Departmental grant manager and discuss what changes need to be made to the plan and why. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing.

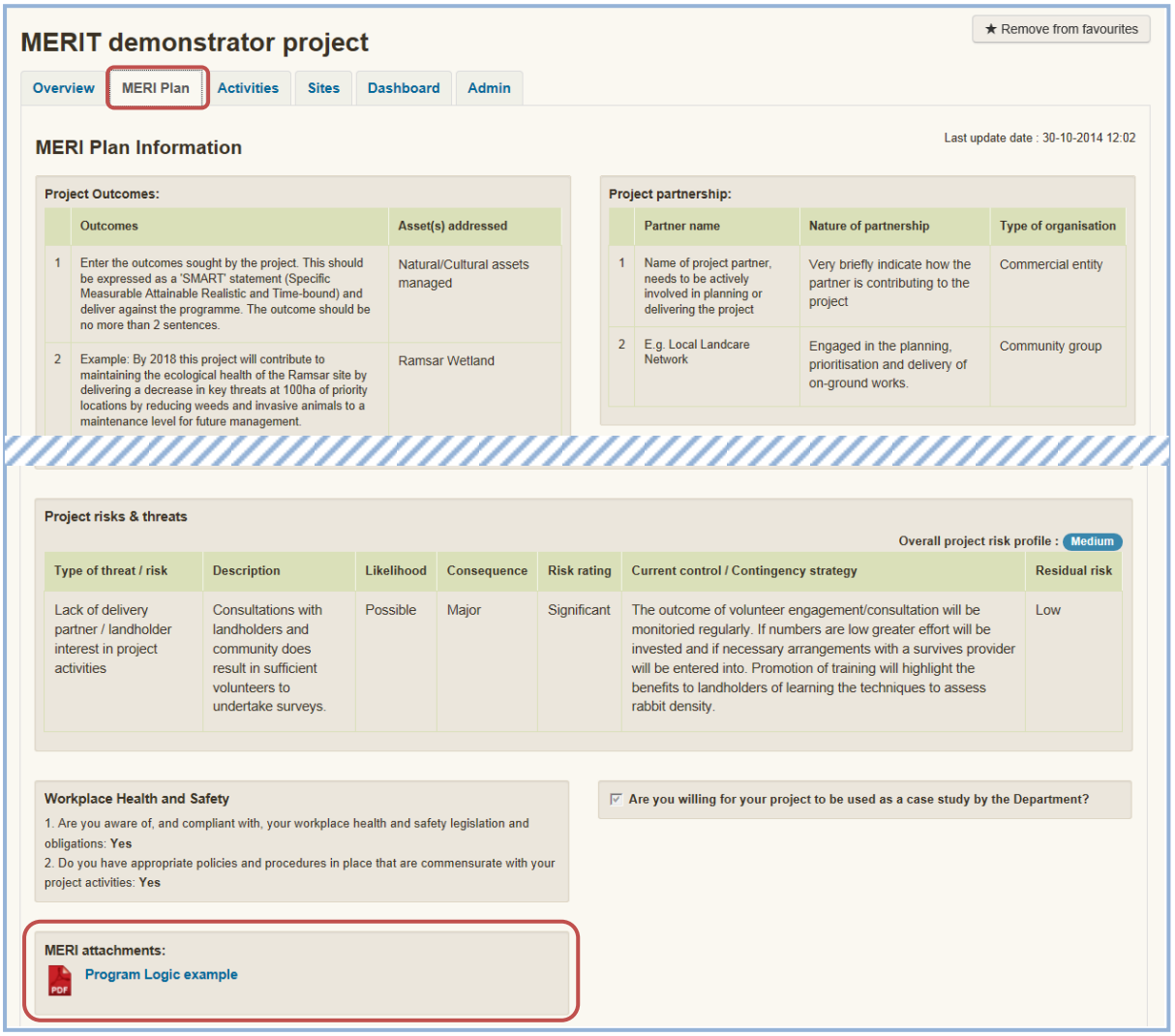
5.1 Programme Logic (optional)

Developing a programme logic diagram can be useful in helping demonstrate how your project aligns with the NRM programme goals and objectives and help ensure that the approach, and steps needed to achieve the project outputs and outcomes, are clear. A programme logic is usually represented as a diagram or matrix that shows a series of expected consequences, not just a sequence of events. It expresses how change is expected to occur. A programme logic diagram can be attached to your project in MERIT and should reflect, and be consistent with, the important detail captured elsewhere in the project plan. A programme logic diagram can also be a useful tool for communicating the project to others. The diagram below depicts the basic structure and levels of a programme logic diagram.


Program Strategic Objective
Overall program objective that your project will contribute to.
Longer Term Program Outcomes – Relevant Biodiversity Longer Term Goals – see the relevant Program MERI Plans
Project Outcomes - Project Outcomes are the desired (or actual) results, or impacts of having undertaken the sub-project(s), such as maintenance or improvement of the biophysical assets, enhanced community capacity, or changes to an organisation.
Project Outputs - also known as 'immediate activities and outcomes'. Project Outputs are the key actions to be delivered by the project and are largely within the direct influence of the project team. Project Outputs should be expressed as a SMART Statements and need to be monitored and reported as part of the project.
Activities – including 'foundational activities' these are the activities specific to the project that underpin successful planning and delivery of the Project Outputs. These might include establishing and incorporating relevant plans, establishing steering committees, undertaking planning days, surveying sites and mapping locations, establishing base lines and delivering on ground NRM actions.

Refer to Developing and using program logic in natural resource management: user guide on the MERI page of the www.nrm.gov.au website. Your grant manager will also be able to assist.

Refer to Information Sheet 11 for instructions on how to attach a programme logic document in MERIT. The programme logic document can be accessed from the bottom of the project's MERI Plan tab.


MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
Admin
MERI Plan Information
Last update date : 30-10-2014 12:02
Project Outcomes:
Outcomes
Asset(s) addressed
1
Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. The outcome should be no more than 2 sentences.
Natural/Cultural assets managed
2
Example: By 2018 this project will contribute to maintaining the ecological health of the Ramsar site by delivering a decrease in key threats at 100ha of priority locations by reducing weeds and invasive animals to a maintenance level for future management.
Ramsar Wetland
Project partnership:
Partner name
Nature of partnership
Type of organisation
1
Name of project partner, needs to be actively involved in planning or delivering the project
Very briefly indicate how the partner is contributing to the project
Commercial entity
2
E.g. Local Landcare Network
Engaged in the planning, prioritisation and delivery of on-ground works.
Community group
Project risks & threats
Overall project risk profile : Medium
Type of threat / risk
Description
Likelihood
Consequence
Risk rating
Current control / Contingency strategy
Residual risk
Lack of delivery partner / landholder interest in project activities
Consultations with landholders and community does result in sufficient volunteers to undertake surveys.
Possible
Major
Significant
The outcome of volunteer engagement/consultation will be monitoried regularly. If numbers are low greater effort will be invested and if necessary arrangements with a survives provider will be entered into. Promotion of training will highlight the benefits to landholders of learning the techniques to assess rabbit density.
Low
Workplace Health and Safety
1. Are you aware of, and compliant with, your workplace health and safety legislation and obligations: Yes
2. Do you have appropriate policies and procedures in place that are commensurate with your project activities: Yes
Are you willing for your project to be used as a case study by the Department?
MERI attachments:
Program Logic example

5.2 Creating or editing the MERI Plan

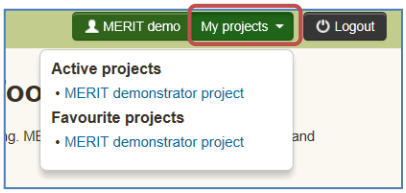
The project MERI plan is a living document that should be updated at least annually through consultation between a funding recipient and the Departmental grant manager. The MERI plan has been streamlined to reduce red-tape while still delivering key information about funded projects to the Department. Projects commencing from January 2015 will complete the MERI plan in MERIT. Transferring a plan into MERIT is optional for projects that commenced prior to 2015, unless otherwised advised by the department.

The MERI plan will inform the 3 remaining components of the project plan (planned activities, output targets, project risks and threats). The MERI Plan and Project risks & threats are displayed on the MERI Plan tab, which can be viewed by all users with access to the project.

To create/edit the MERI Plan:

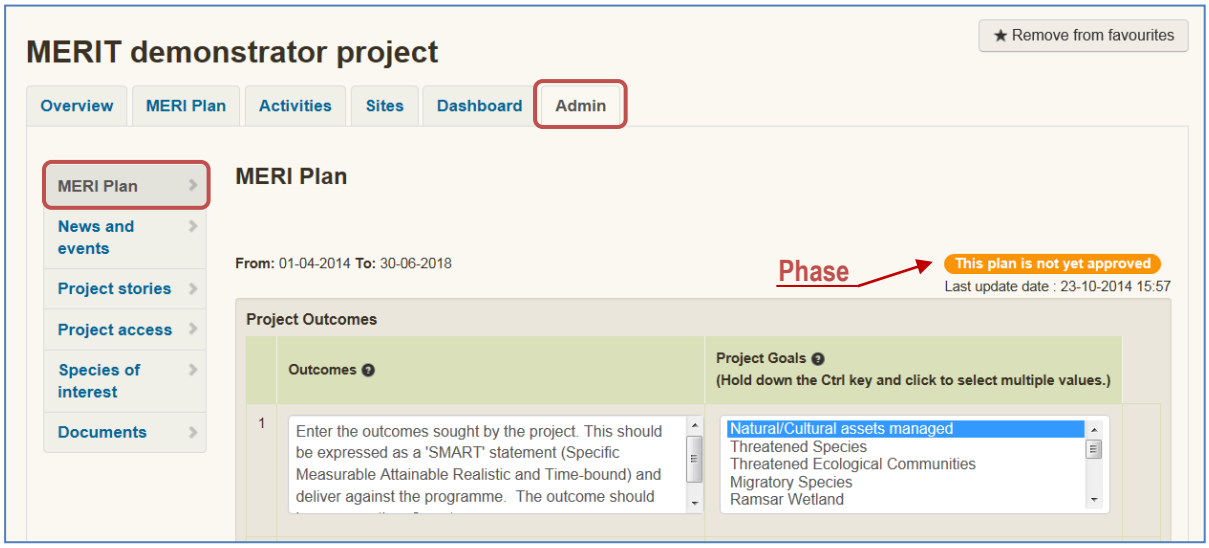
1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Admin** tab on the Project home page.

4. Click **MERI Plan** sub tab on the left of the screen.



Check the phase for your project. The MERI Plan template cannot be edited if the plan has been submitted or approved (teal or green phase). If you need to edit the project plan, contact your Departmental grant manager and discuss what changes need to be made to the plan and why. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing.

5. Complete the MERI Plan template. The template contains descriptions of the information required in each field. The descriptions can be viewed by hovering your mouse cursor over the icon. They are also listed below:

Project Outcomes

Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. A project may have more than 1 outcome.

Suggested Length: The outcome should be no more than 2 sentences.

Project Goals

Project goals are the high level assets being addressed by the project outcome. An outcome may be delivering against more than one of these.

Suggested Length: Select the relevant Project Goals the Project Outcome is addressing from the list available. Selecting the goals allows the Department to more efficiently evaluate programme performance. Please review the list and select the most appropriate goal being addressed; 'other' should be used as a last resort.

Monitoring indicator

List the indicators of project success to be monitored. These may be things such as increased community participation, increased abundance of a threatened species, maintenance of vegetation condition etc.

Suggested Length: The indicator should be approximately 1 to 2 sentences. The indicator being monitored should be easily identifiable on review of the text.

Monitoring approach

How will this indicator be monitored? Briefly describe the method to be used to monitor the indicator.

Suggested Length: The section should provide sufficient detail so that a grants manager can easily understand the methods being used and when the monitoring will take place. Broad definitions are sufficient, e.g. vegetation condition monitoring using Bushland Condition Monitoring method. There is no requirement to outline that this involves transects, plots etc.

National and regional priorities

List the name of the National or Regional plan the project is addressing, what section (target/outcomes/objective etc) of the plan is being addressed, and in what way will the project deliver against this section?

Suggested Length: 1 to 2 sentences on the strategic alignment of the project to the document is sufficient as long as it clearly outlines how the project aligns.

Project implementation / delivery mechanism

How is the project to be delivered? Briefly describe the high-level method/s to be used, e.g. the types and rates of herbicide to use are not required. The delivery mechanism/s should provide sufficient detail to understand how the project's outcomes will be achieved.

Suggested Length: Length will vary from project to project because of the variation in projects complexity and the range of outcomes being delivered. Succinctly describe the delivery mechanisms.

Project partnerships

Provide the name of project partners. Project partners are those partners actively involved in planning or delivering the project, very briefly indicate how the partner is contributing to the project and select the most appropriate partner type from the list provided.

Suggested Length: Nature of partnership should be able to be described in 2 to 3 sentences. Please list all partners actively involved in the planning and delivery of the project. The type of organisation allows the Department to more efficiently evaluate programme performance.

Key evaluation question

Please list the Key Evaluation Questions for your project. Evaluation questions should cover the effectiveness of the project and whether it delivered what was intended; the impact of the project; the efficiency of the delivery mechanism/s, and the appropriateness of the methodology. These need to be answerable within the resources and time available to the project.

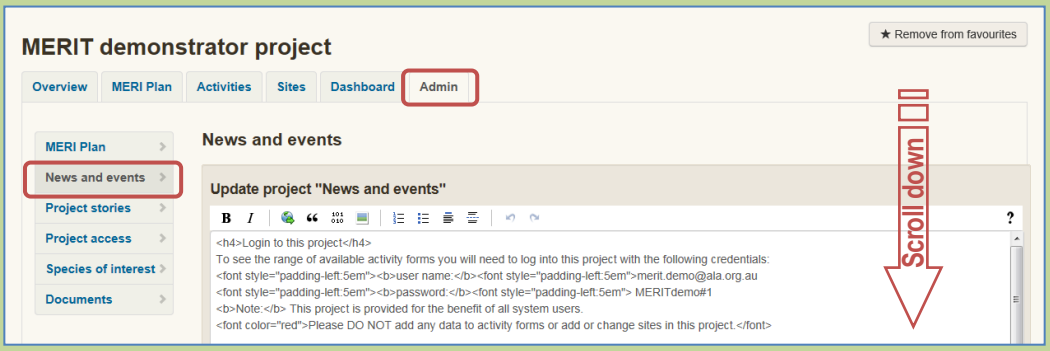
Suggested Length: Provide as many KEQs as necessary to ensure your grants manager has sufficient evidence that appropriate project evaluation processes are in place to ensure project outcomes are met.

Project Events and Announcements **Can be edited at any time – see below box**

This section provides grantee's a place to provide key forward (planned) announcables and invite the Australian Government to participate in launches, communication and media opportunities related to the annouceables. This includes opportunities to announce recipients of small projects and related activities. Dates provided can be indicative only, grant managers can clarify actual dates closer to the timing of the events or as required.

Suggested Length: Provide a full list of key events and their indicative dates. The list does not need to include field days, workshops, training sessions etc.

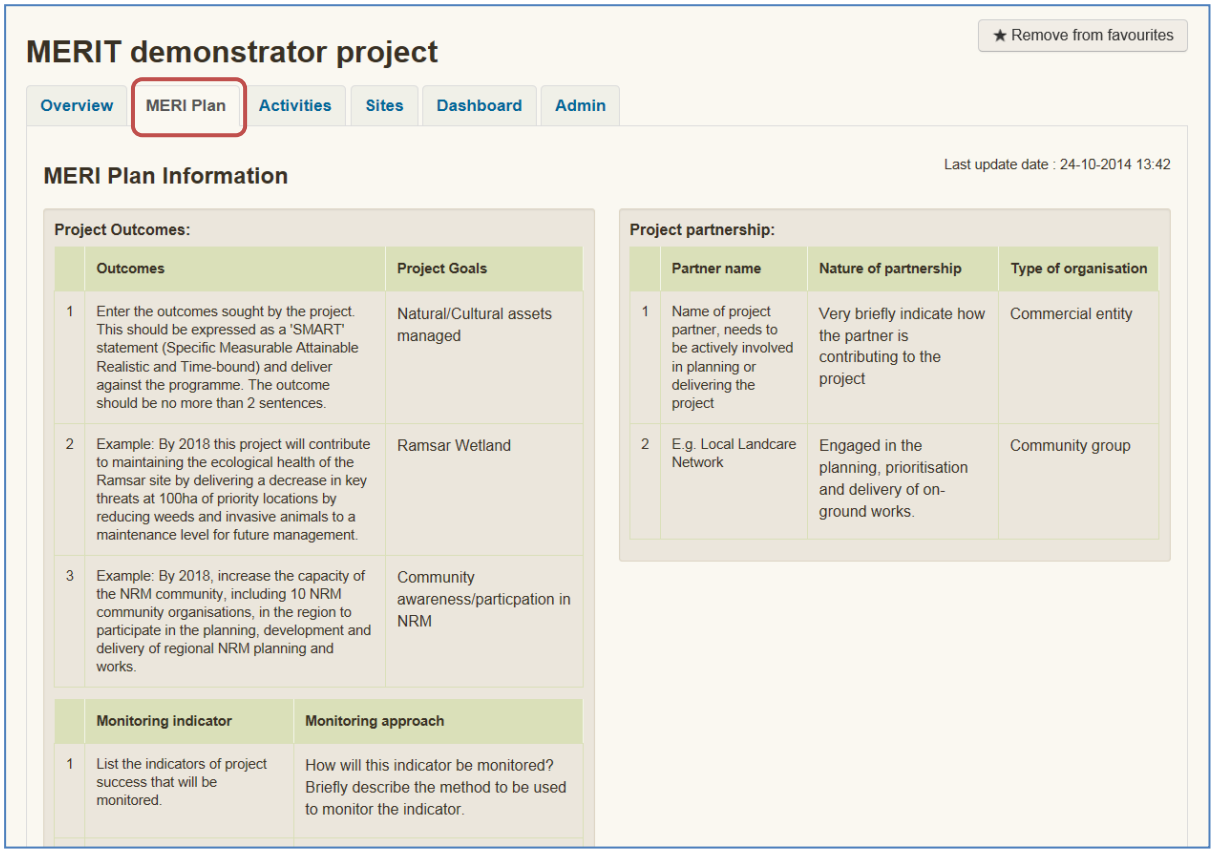
Project Events and Announcements is the only section of the MERI Plan that can be edited at any time, regardless of the phase your project is in. To edit Project Events and Announcements in a submitted or approved plan, go to the bottom of the **Admin/News & Events** sub-tab.



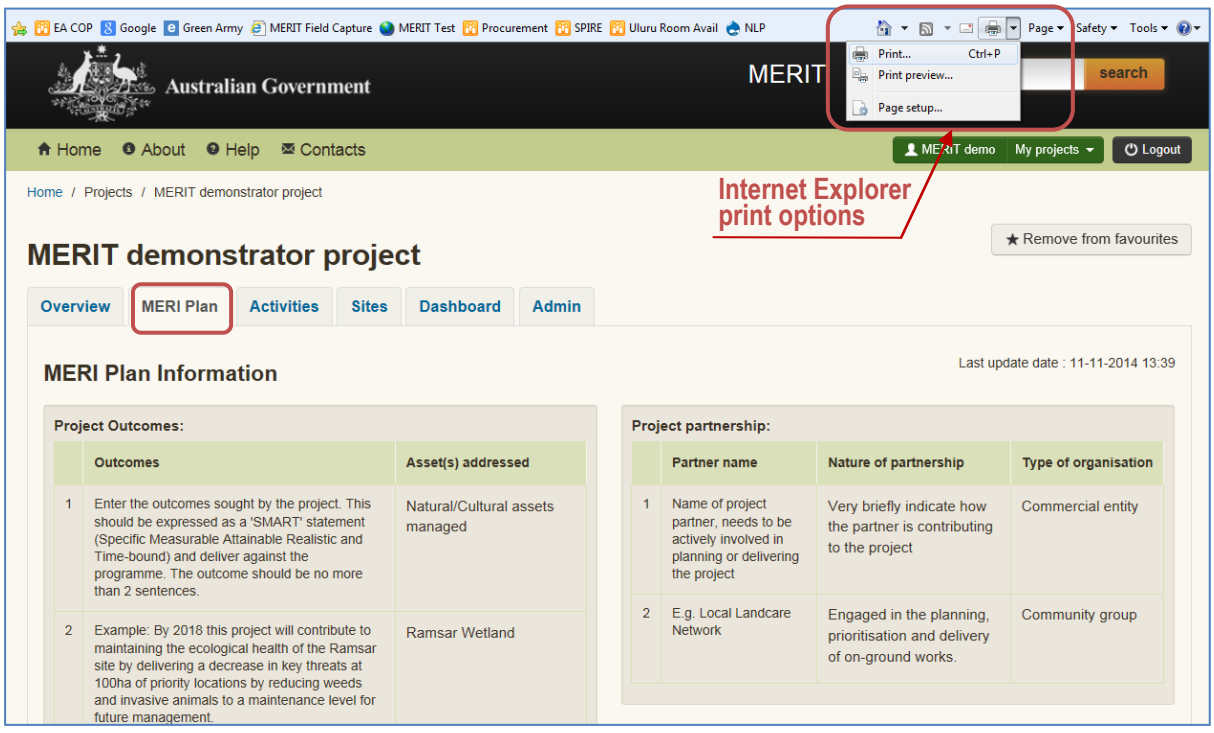
Project Budget

Include the planned budget expenditure against each programme objective. For NLP regional delivery projects please provide 3 rows per objective. One to indicate the amount directed toward engaging the community, the second to indicate the amount directed toward indigenous engagement and the third indicating all other expenditure against the objective.

6. Once the template is completed, click the **Save changes** button at the bottom of the page. The information in the template is now displayed on the MERI Plan tab and can be viewed by all project members.


MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
Admin
MERI Plan Information
Last update date : 24-10-2014 13:42
Project Outcomes:
Outcomes
Project Goals
1
Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. The outcome should be no more than 2 sentences.
Natural/Cultural assets managed
2
Example: By 2018 this project will contribute to maintaining the ecological health of the Ramsar site by delivering a decrease in key threats at 100ha of priority locations by reducing weeds and invasive animals to a maintenance level for future management.
Ramsar Wetland
3
Example: By 2018, increase the capacity of the NRM community, including 10 NRM community organisations, in the region to participate in the planning, development and delivery of regional NRM planning and works.
Community awareness/particpation in NRM
Monitoring indicator
Monitoring approach
1
List the indicators of project success that will be monitored.
How will this indicator be monitored? Briefly describe the method to be used to monitor the indicator.
Project partnership:
Partner name
Nature of partnership
Type of organisation
1
Name of project partner, needs to be actively involved in planning or delivering the project
Very briefly indicate how the partner is contributing to the project
Commercial entity
2
E.g. Local Landcare Network
Engaged in the planning, prioritisation and delivery of on-ground works.
Community group

7. If you wish to print or save the MERI Plan in another location, click the project's **MERI Plan** tab and use the options on your browser's menu bar to complete the action.


Australian Government
MERIT
search
Print... Ctrl+P
Print preview...
Page setup...
Home
About
Help
Contacts
MERIT demo
My projects
Logout
Home / Projects / MERIT demonstrator project
Internet Explorer print options
MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
Admin
MERI Plan Information
Last update date : 11-11-2014 13:39
Project Outcomes:
Outcomes
Asset(s) addressed
1
Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. The outcome should be no more than 2 sentences.
Natural/Cultural assets managed
2
Example: By 2018 this project will contribute to maintaining the ecological health of the Ramsar site by delivering a decrease in key threats at 100ha of priority locations by reducing weeds and invasive animals to a maintenance level for future management.
Ramsar Wetland
Project partnership:
Partner name
Nature of partnership
Type of organisation
1
Name of project partner, needs to be actively involved in planning or delivering the project
Very briefly indicate how the partner is contributing to the project
Commercial entity
2
E.g. Local Landcare Network
Engaged in the planning, prioritisation and delivery of on-ground works.
Community group

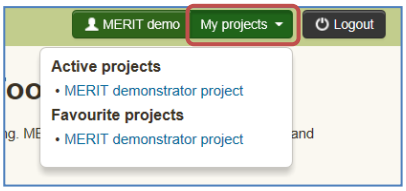
5.3 Viewing/creating/editing the Planned Activities list

This component of the project plan lists the activities proposed to be undertaken in order to achieve the project's objectives. Activities are ordered into **stages**, which relate to the reporting obligations for the grant. For most grants, there are two stages per calendar year: January-June and July-December. The 'From' and 'To' dates of an activity determine which stage it is allocated to.

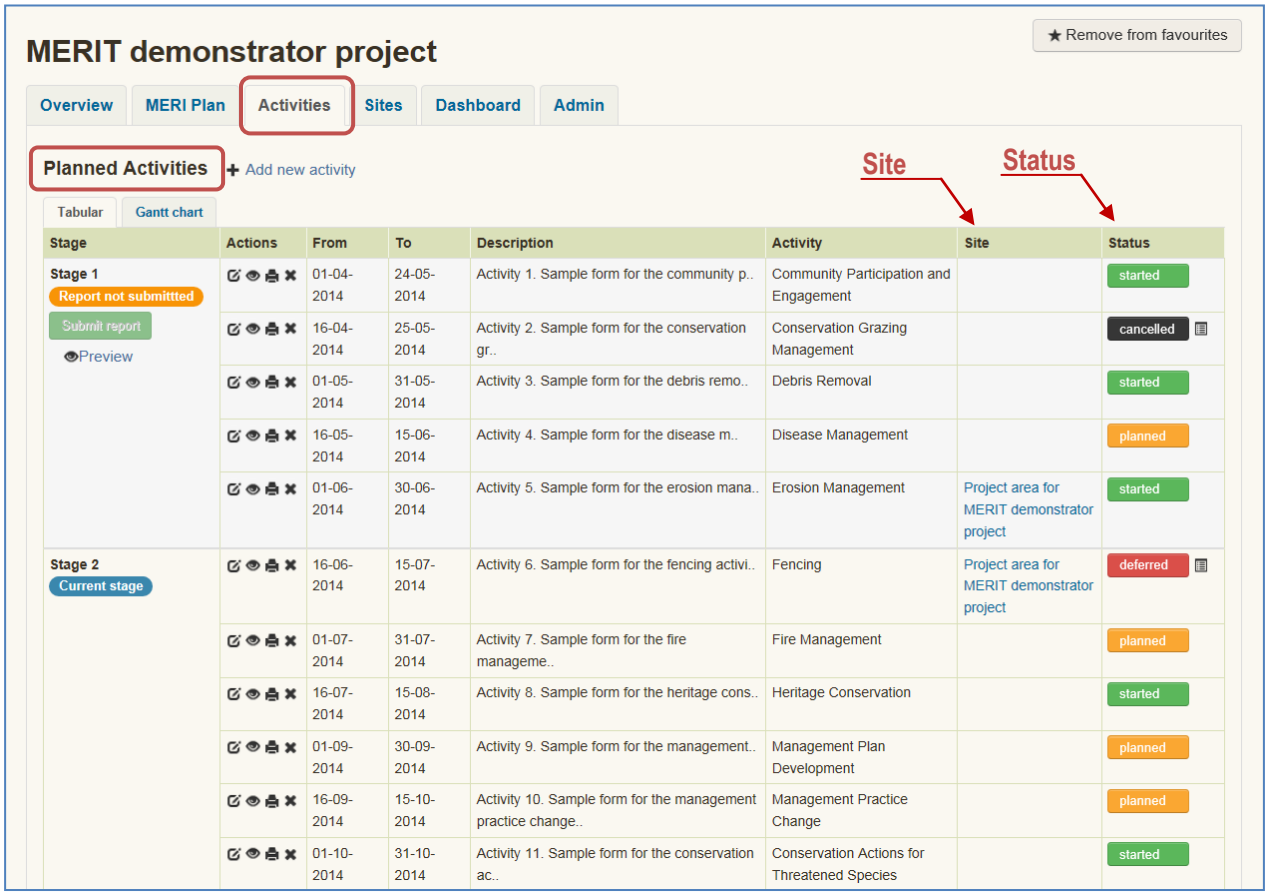
5.3.1 View/review the Planned Activities list:

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Activities** tab on the Project home page. The list of planned activities appears at the top of the page.



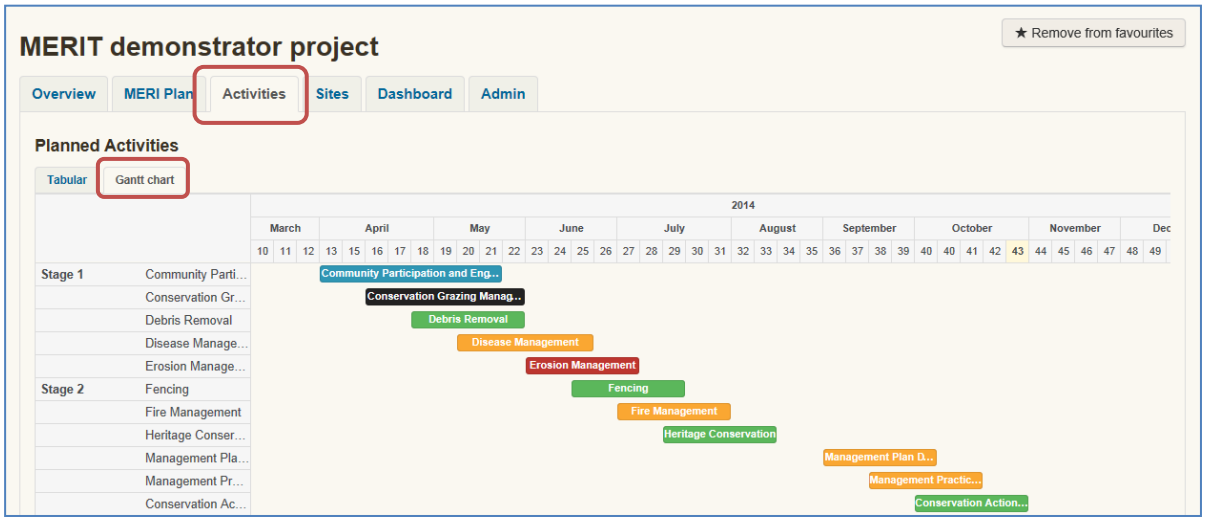
Stage	Actions	From	To	Description	Activity	Site	Status
Stage 1 Report not submitted Submit report Preview		01-04-2014	24-05-2014	Activity 1. Sample form for the community p..	Community Participation and Engagement		started
		16-04-2014	25-05-2014	Activity 2. Sample form for the conservation gr..	Conservation Grazing Management		cancelled
		01-05-2014	31-05-2014	Activity 3. Sample form for the debris remo..	Debris Removal		started
		16-05-2014	15-06-2014	Activity 4. Sample form for the disease m..	Disease Management		planned
		01-06-2014	30-06-2014	Activity 5. Sample form for the erosion mana..	Erosion Management	Project area for MERIT demonstrator project	started
Stage 2 Current stage		16-06-2014	15-07-2014	Activity 6. Sample form for the fencing activi..	Fencing	Project area for MERIT demonstrator project	deferred
		01-07-2014	31-07-2014	Activity 7. Sample form for the fire manageme..	Fire Management		planned
		16-07-2014	15-08-2014	Activity 8. Sample form for the heritage cons..	Heritage Conservation		started
		01-09-2014	30-09-2014	Activity 9. Sample form for the management..	Management Plan Development		planned
		16-09-2014	15-10-2014	Activity 10. Sample form for the management practice change..	Management Practice Change		planned
		01-10-2014	31-10-2014	Activity 11. Sample form for the conservation ac..	Conservation Actions for Threatened Species		started

4. The list of planned activities may be pre-populated from a paper MERI Plan (pre-2015) or online application form, be pre-existing (previously approved and requiring editing), or the list may need to be wholly created within MERIT (new projects).

The list also displays the site (if added) and status of an activity. New projects that are yet to commence will have activities displaying a status of 'planned'. For an explanation of status, see Information Sheet 9.

Planned activities are listed in order of start date ('From'), then end date ('To'). Changing the 'From' or 'To' date will change an activity's position in the list. If it doesn't, refresh your browser (F5). The stage for the activity is determined by the end date.

5. The **Gantt Chart** tab displays the activity list according to the planned dates for each activity. This view may assist with assessing whether or not the proposed timing for each activity follows a logical progression. The colour of the activity corresponds to its status.



6. When creating or reviewing your project's list of planned activities, you may want to ask yourself the following questions:

- Is the list of activities appropriate for the outcomes detailed in the MERI Plan?
- Is the list of activities complete?
- What is the logical progression/order for the activities?
- Are there any activities that capture baseline data, site preparation, monitoring and maintenance information?

Use the MERIT reference material (schema, ready reckoner, family tree) to help you.

There are a few instances where you may need to choose between two forms for the activity you plan to undertake.

<u>Fencing</u>

- If your fencing aims to reduce the impact of pest animals on environmental values or agricultural production, choose the *Pest Management* activity form.
- If your fencing aims to protect an NRM asset from public access, choose the *Public Access and Infrastructure* activity form.
- If your fencing protects an NRM resource (e.g. revegetation), choose the *Fencing* activity form.

<u>Weed Treatment</u>

- If your weed treatment is related to site preparation (e.g. for revegetation), choose the *Site Preparation* activity form.
- For all other weed treatment, choose the *Weed Treatment* activity form.

There are two activity forms that must be included in a project plan.

A '**Progress, Outcomes & Learnings**' activity must be completed at the end of every stage.

An '**Outcomes, Evaluation and Learnings**' activity must be completed at the end of every project.

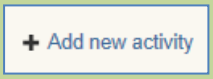
Refer to the MERIT Schema for more information on these forms.

NB: Data entered into the above activity forms appear in the Stage Summary document (see Information Sheet 12). If these activity forms are incomplete or missing, the Stage Summary will not populate correctly.

5.3.2 Add a new activity

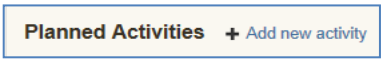
Activities can only be added to projects if the project plan has not been submitted or approved. If you need to add a new activity to a submitted or approved project plan, contact your Departmental grant manager and discuss what changes need to be made to the plan and why. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing.

An easy way to check if your plan can be edited, is to look for the **Add new activity** button at the top of the Planned Activities list. If you can't see this button, your project plan cannot be edited.

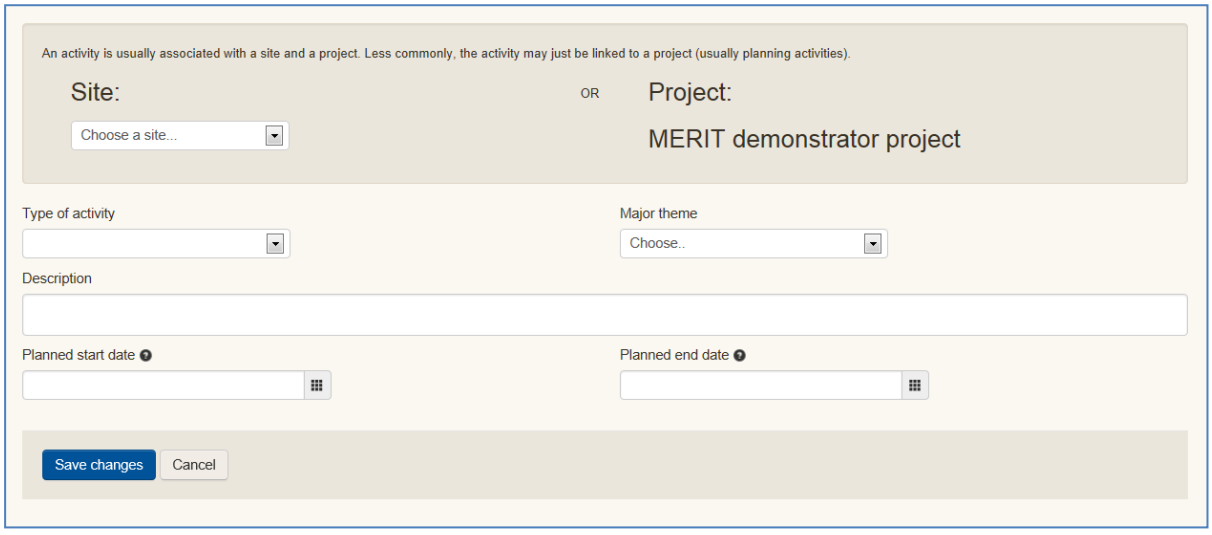


7. Navigate to the project's **Activities** tab (steps 1 to 3).

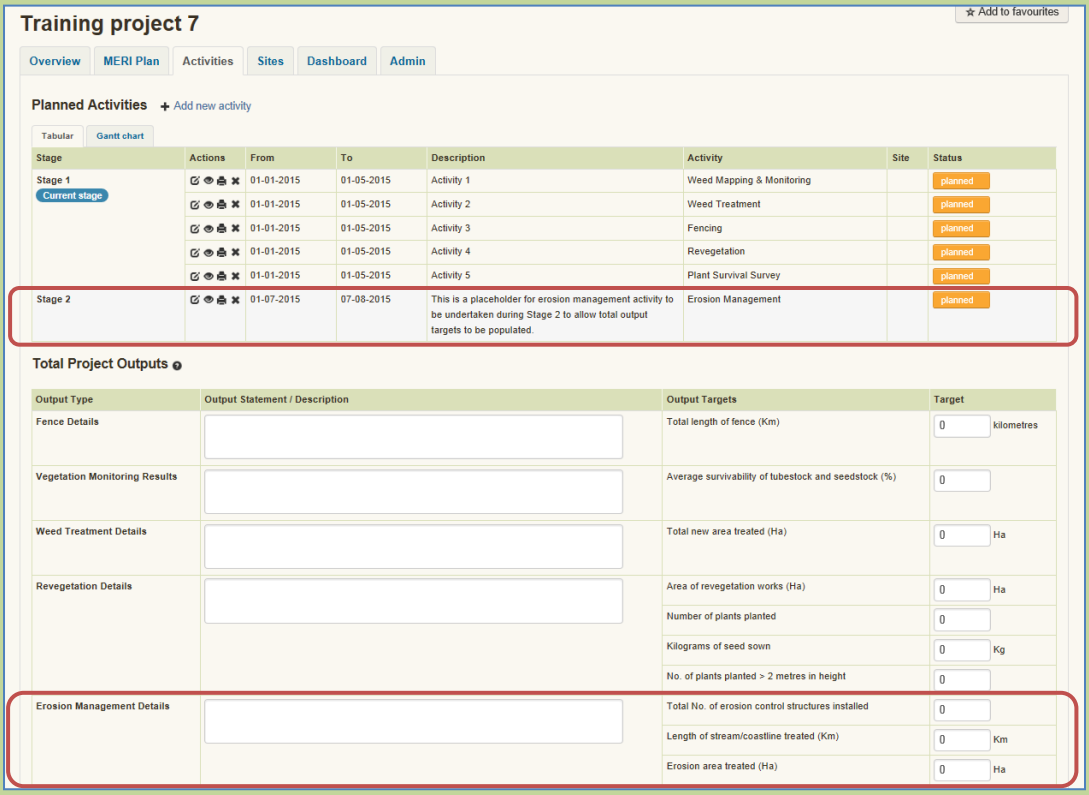
8. Click on the **Add new activity** link at the top of the list of planned activities.



9. Complete the form using the drop down lists and free text boxes. Use the MERIT reference material (schema, ready reckoner, family tree) to help you decide the most appropriate 'type of activity'. The site for the activity can be added now (if it has already been created), or after the plan has been approved. See Information Sheet 7 and 8 for instructions on creating a site.



In instances when you do not have confirmed details for an activity (e.g. you know you will do Erosion Management some time during Stage 2), add the activity to the relevant state and note in the description that the form is a placeholder. This will ensure that the corresponding output target appears in the Total Project Outputs table, so it can be populated (refer Section 5.4 of this information sheet). Edit the activity dates once you have a better idea of timing. Aim to have the proceeding 12-18 months' of activities finalised in MERIT so your Grant Manager can gauge how the project is progressing.



Themes are programme specific priorities for investment which are defined in the relevant programme guidelines. Under NLP, 'strategic objectives' are equivalent to themes.

A project's theme may be articulated in the application form and must be entered into MERIT at the activity level.

A project may have a primary theme, with one or two activities addressing a secondary theme. When assigning a theme, choose one relevant to the activity. If an activity doesn't address a specific theme (e.g. Progress, outcomes and learnings stage report) choose the project's primary theme.

Themes can be added to an activity when creating the activity list (before the plan is submitted for approval) or entering activity field data (after the plan is approved).

10. Click **Save changes.** Your new activity should be added to the list. If not, refresh your browser (F5 key).

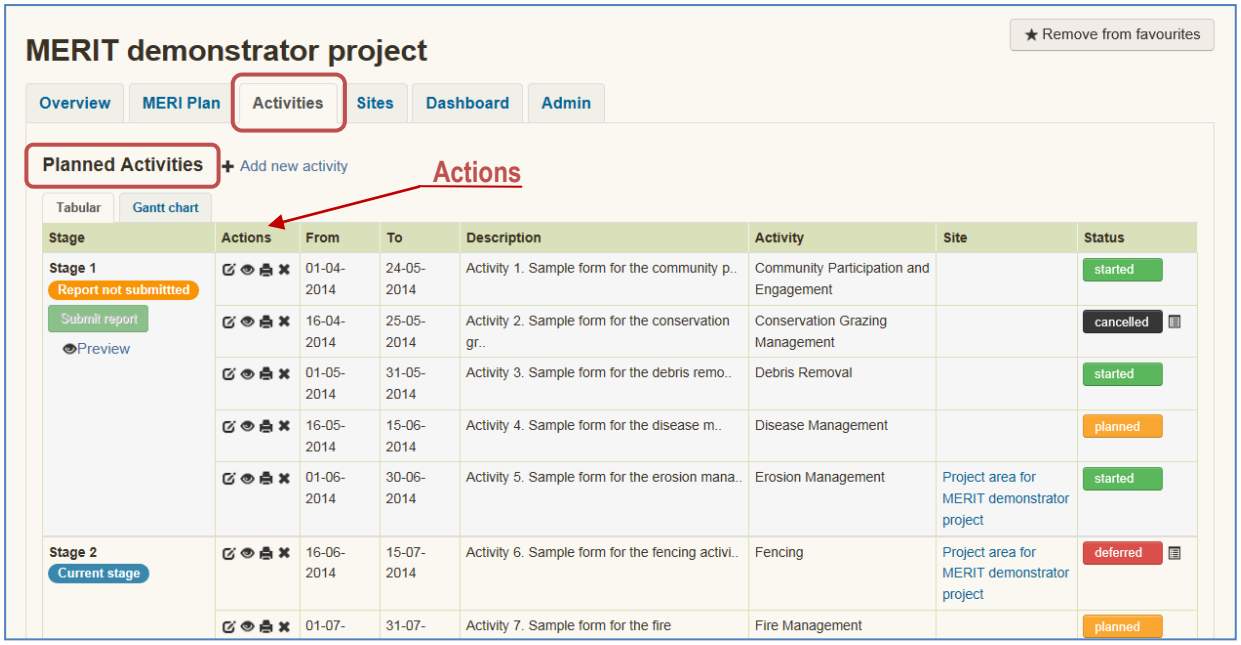
5.3.3 Edit/ View/ Print/ Delete an activity

There are 4 actions for an activity.

Edit View Print (blank template) Delete

11. Navigate to the project's **Activities** tab (steps 1 to 3).

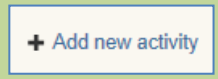
12. Click the relevant icon in the 'Actions' column next to the activity you wish to edit/view/print/delete.



13. If you are editing an activity, make the necessary changes and click **Save changes**.

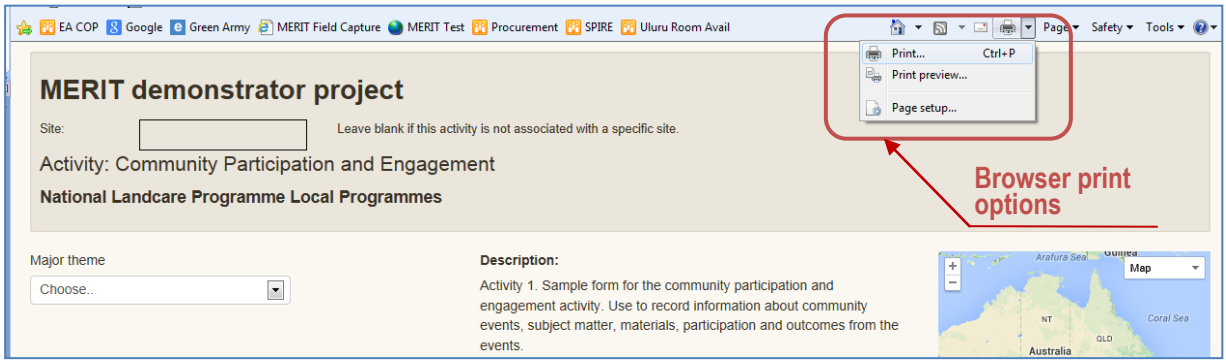
Activities can only be edited if the project plan has not been submitted or approved. If you need to edit an activity in a submitted or approved project plan, contact your Departmental grant manager and discuss what changes need to be made to the plan and why. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing.

An easy way to check if your plan can be edited, is to look for the **Add new activity** button at the top of the Planned Activities list. If you can't see this button, your project plan cannot be edited.



14. If you wish to print the data within an activity form, click View , then use the print options on your browser's menu bar to complete the action.

15. The print function produces a **blank** template of the form for use in the field. The activity form will be opened as a .html document in your browser. Use the print options on your browser's menu bar to complete the print action.



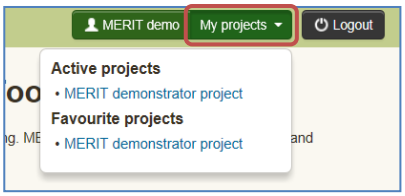
5.4 Viewing/editing the Total Project Output targets

The Total Project Outputs table summarises the the tangible (measurable and practical), immediate and intended results to be produced through NRM investment (e.g. area (ha) of revegetation completed, number of stakeholder engagement sessions held). The list of output targets is generated automatically according to the Planned Activities. **Populating the output target values table is compulsory for your project plan to be approved.** The project dashboard will not work correctly until the output target values are populated.

To view or edit the total project output targets:

1. Log in to MERIT.

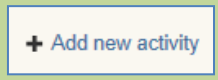
2. Click the **My Projects** button on the menu bar. Select the relevant project.



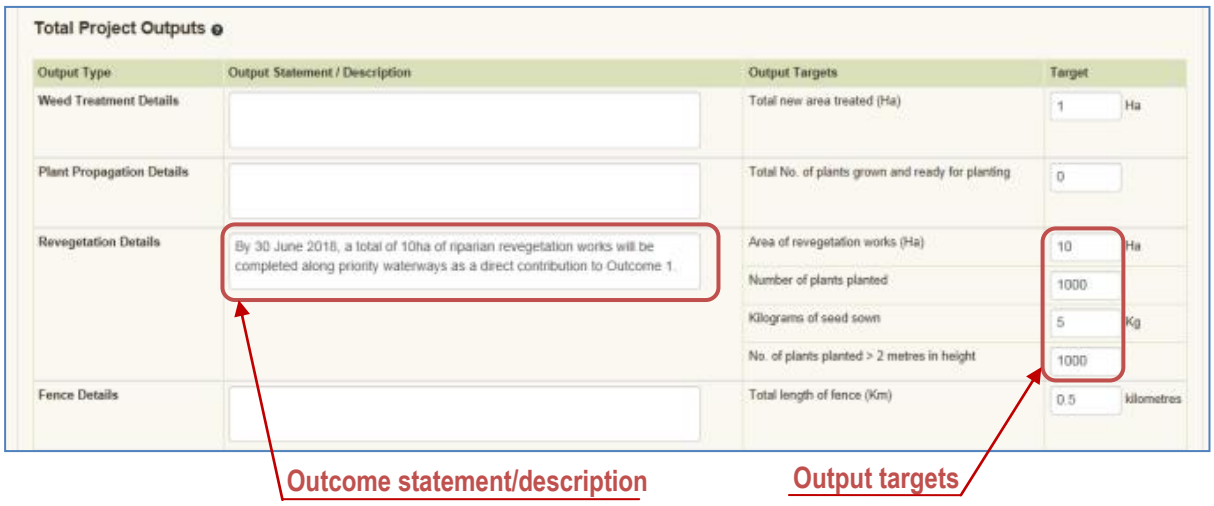
3. Click the **Activities** tab on the Project home page. The list of Output Targets appears below the list of Planned Activities.

The **Total Project Outputs** table can only be edited if the project plan has not been submitted or approved. If you need to add or edit an output target to a submitted or approved project plan, contact your Departmental grant manager and discuss what changes need to be made to the plan and why. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing.

An easy way to check if your plan can be edited, is to look for the **Add new activity** button at the top of the Planned Activities list. If you can't see this button, your project plan cannot be edited.



4. Scroll down to the **Total Project Outputs** table. Add an output statement/description and target. The output statement should be SMART (Specific, Measurable, Attainable, Realistic and Time-bound) and relate back to the outcomes in the MERI Plan. For example, for revegetation, the output statement may be 'by 30 June 2018, a total of 10ha of riparian revegetation works will be completed along priority waterways as a direct contribution to Outcome 1' and to achieve this they aim to plant 1000 tubestock and broadcast 5kg of seed.



5.5 Viewing/adding/editing the Project risks & threats

This table details the risks and threats to the project and the mitigation strategies being used to address them. Risks identified should be those that the project team consider to be within the reasonable influence of the project team to anticipate and manage.

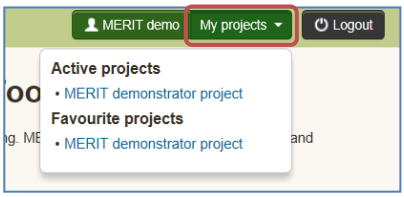
Currently, the project risks and threats are entered manually into MERIT. The risks and threats should be reviewed and updated each reporting period.

Project risks and threats can be edited **at any time**, regardless of the phase of the project.

To add/edit project risks and threats:

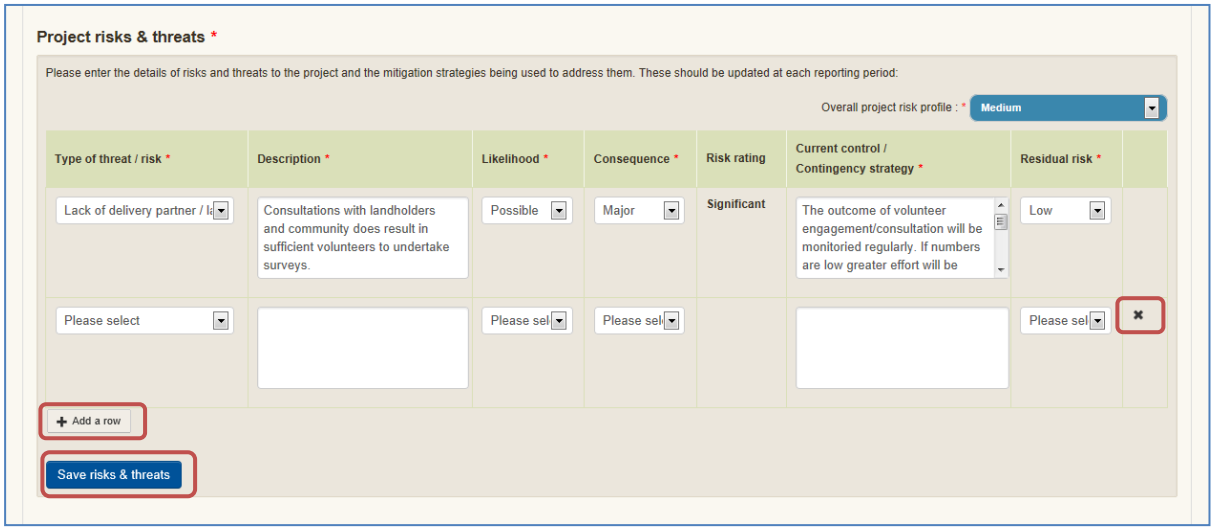
1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Activities** tab on the Project home page. The list of Project risks and threats appears below the list of Output Targets.

4. Complete each row in the table using the drop down lists and free text boxes.


Project risks & threats *
Please enter the details of risks and threats to the project and the mitigation strategies being used to address them. These should be updated at each reporting period:
Overall project risk profile : *
Medium
Type of threat / risk *
Description *
Likelihood *
Consequence *
Risk rating
Current control / Contingency strategy *
Residual risk *
Lack of delivery partner / l
Consultations with landholders and community does result in sufficient volunteers to undertake surveys.
Possible
Major
Significant
The outcome of volunteer engagement/consultation will be monitoried regularly. If numbers are low greater effort will be
Low
Please select
Please sel
Please sel
Please sel
Add a row
Save risks & threats

Field	Option
Type of risk/threat	Choose the best option from the drop down list
Description	Describe the threat/risk, its sources and impacts
Likelihood	Select from: almost certain, likely, possible, unlikely, remote
Consequence	Select from: insignificant, minor, moderate, major, extreme
Rating	Automatically generated according to the likelihood and consequence of the risk
Current control/contingency strategy	Describe what you will do to mitigate the threat/risk, source or impact to an acceptable level.
Residual Risk	Level of risk after application of the control / contingency. Consider whether further management strategies are needed
Overall project risk profile	Select the value that reflects the highest combination of the most likely risk and the most severe consequence. Choose from: High, Significant, Medium or Low.

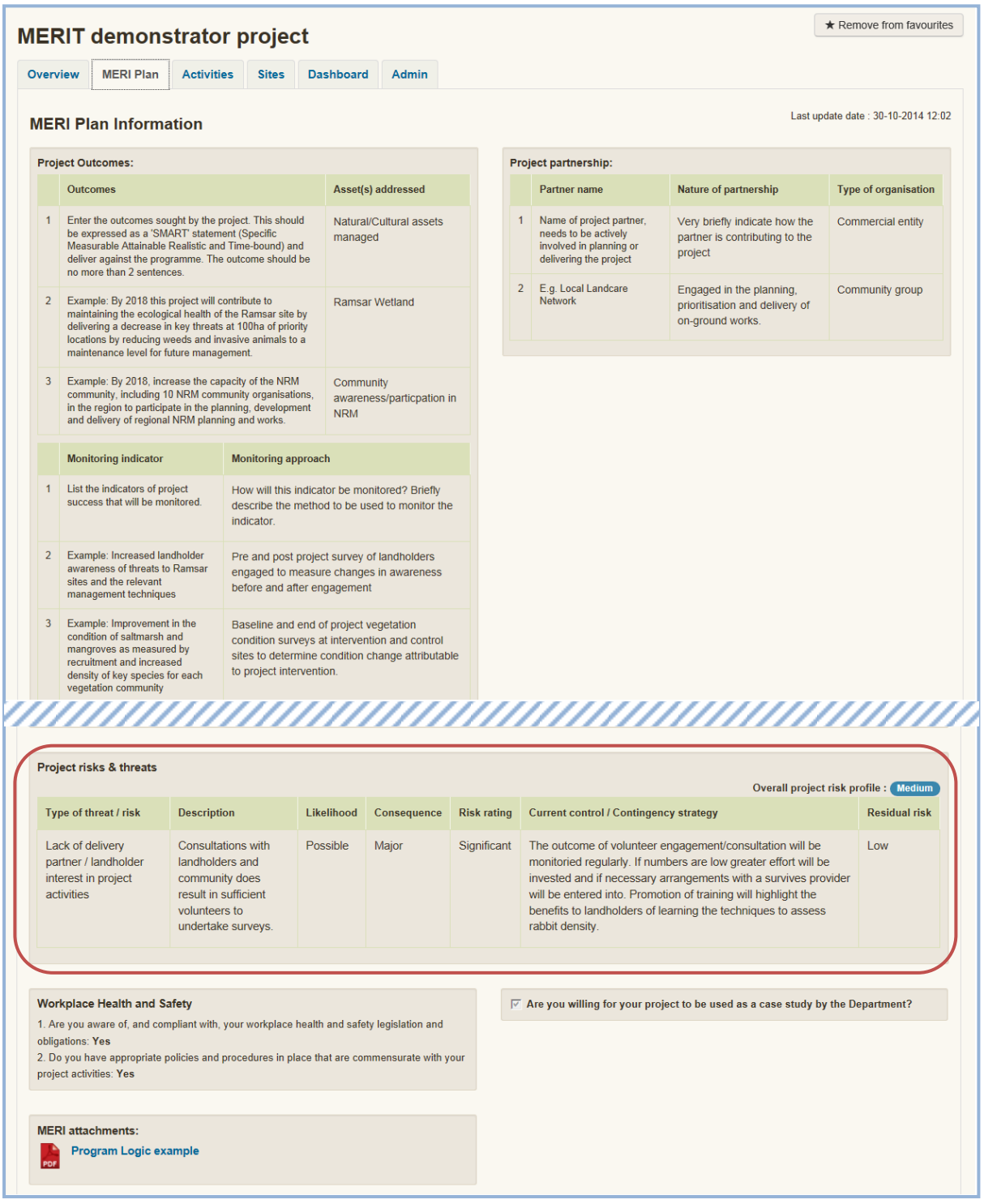
5. Every field within this table is mandatory (must be completed – indicated by red asterisk *).

6. Click **Add a row** if you have more than one risk/threat.

7. Click on the '**X**' (at the right hand side of the row) if you need to delete a risk/threat.

8. Once the table is complete, click the **Save risks & threats** button at the bottom of the page.

9. The information in the table is now displayed on the MERI Plan tab and can be viewed by all project members.



MERIT demonstrator project

★ Remove from favourites

Overview | MERI Plan | Activities | Sites | Dashboard | Admin

MERI Plan Information

Last update date : 30-10-2014 12:02

Project Outcomes:

	Outcomes	Asset(s) addressed
1	Enter the outcomes sought by the project. This should be expressed as a 'SMART' statement (Specific Measurable Attainable Realistic and Time-bound) and deliver against the programme. The outcome should be no more than 2 sentences.	Natural/Cultural assets managed
2	Example: By 2018 this project will contribute to maintaining the ecological health of the Ramsar site by delivering a decrease in key threats at 100ha of priority locations by reducing weeds and invasive animals to a maintenance level for future management.	Ramsar Wetland
3	Example: By 2018, increase the capacity of the NRM community, including 10 NRM community organisations, in the region to participate in the planning, development and delivery of regional NRM planning and works.	Community awareness/particpation in NRM

	Monitoring indicator	Monitoring approach
1	List the indicators of project success that will be monitored.	How will this indicator be monitored? Briefly describe the method to be used to monitor the indicator.
2	Example: Increased landholder awareness of threats to Ramsar sites and the relevant management techniques	Pre and post project survey of landholders engaged to measure changes in awareness before and after engagement
3	Example: Improvement in the condition of saltmarsh and mangroves as measured by recruitment and increased density of key species for each vegetation community	Baseline and end of project vegetation condition surveys at intervention and control sites to determine condition change attributable to project intervention.

Project partnership:

	Partner name	Nature of partnership	Type of organisation
1	Name of project partner, needs to be actively involved in planning or delivering the project	Very briefly indicate how the partner is contributing to the project	Commercial entity
2	E.g. Local Landcare Network	Engaged in the planning, prioritisation and delivery of on-ground works.	Community group

Project risks & threats

Overall project risk profile : Medium

Type of threat / risk	Description	Likelihood	Consequence	Risk rating	Current control / Contingency strategy	Residual risk
Lack of delivery partner / landholder interest in project activities	Consultations with landholders and community does result in sufficient volunteers to undertake surveys.	Possible	Major	Significant	The outcome of volunteer engagement/consultation will be monitoried regularly. If numbers are low greater effort will be invested and if necessary arrangements with a survives provider will be entered into. Promotion of training will highlight the benefits to landholders of learning the techniques to assess rabbit density.	Low

Workplace Health and Safety

1. Are you aware of, and compliant with, your workplace health and safety legislation and obligations: **Yes**
2. Do you have appropriate policies and procedures in place that are commensurate with your project activities: **Yes**

☑ Are you willing for your project to be used as a case study by the Department?

MERI attachments:

Program Logic example

10. The information in the Project risks & threats table is also included in the Stage Summary document, which is generated when a project report is submitted to the Departmental grant manager for approval. For more information on the Stage Summary, see Information Sheet 12

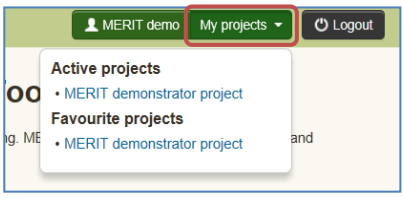
6. SUBMIT A PROJECT PLAN FOR APPROVAL

Phase	This plan is not yet approved	
Access Level	☑ ADMIN	☒ EDITOR

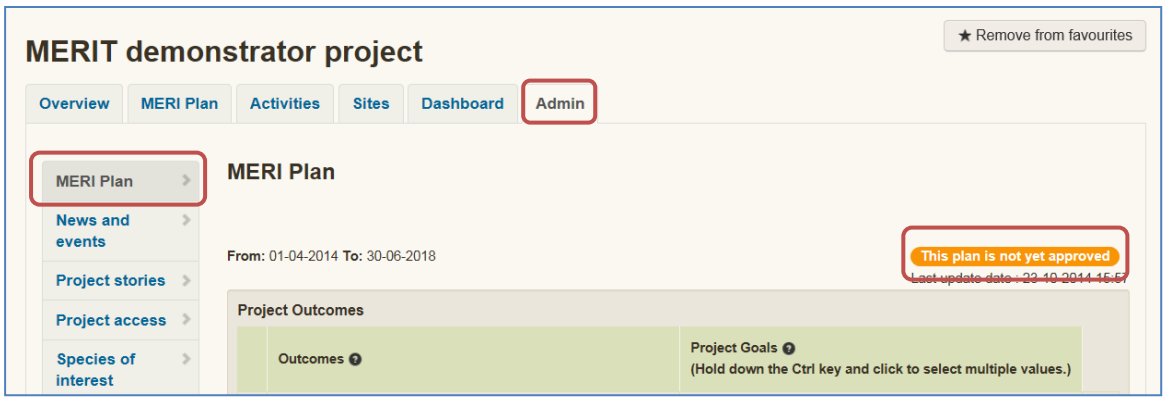
Once your list of activities, output targets and risks & threats (and MERI Plan for new projects) is complete, you are ready to submit your project plan for approval.

1. Log in to MERIT.

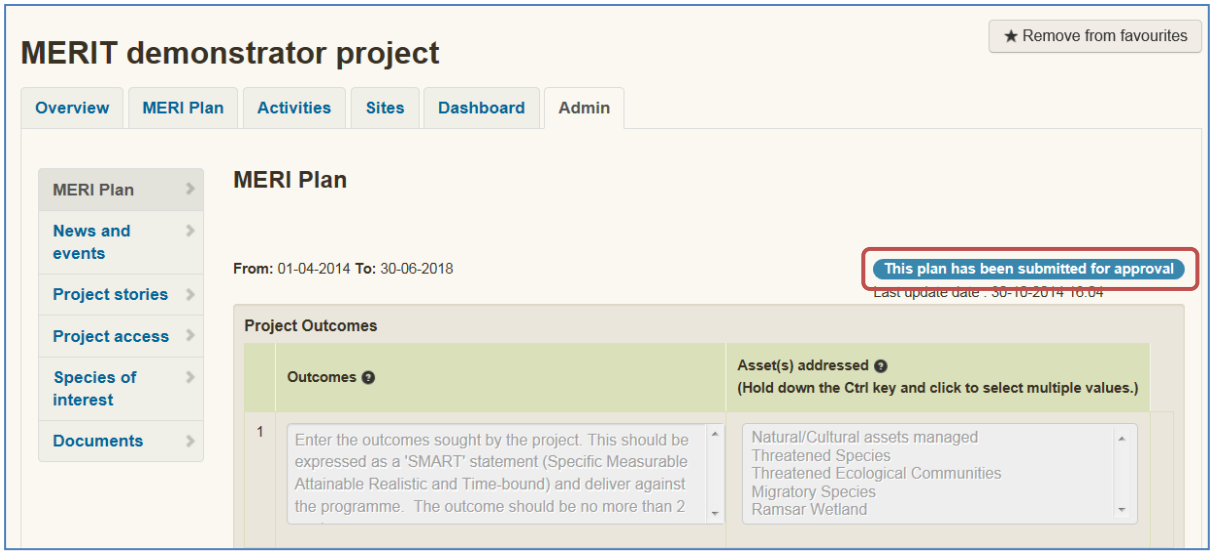
2. Click the **My Projects** button on the menu bar. Select the relevant project.



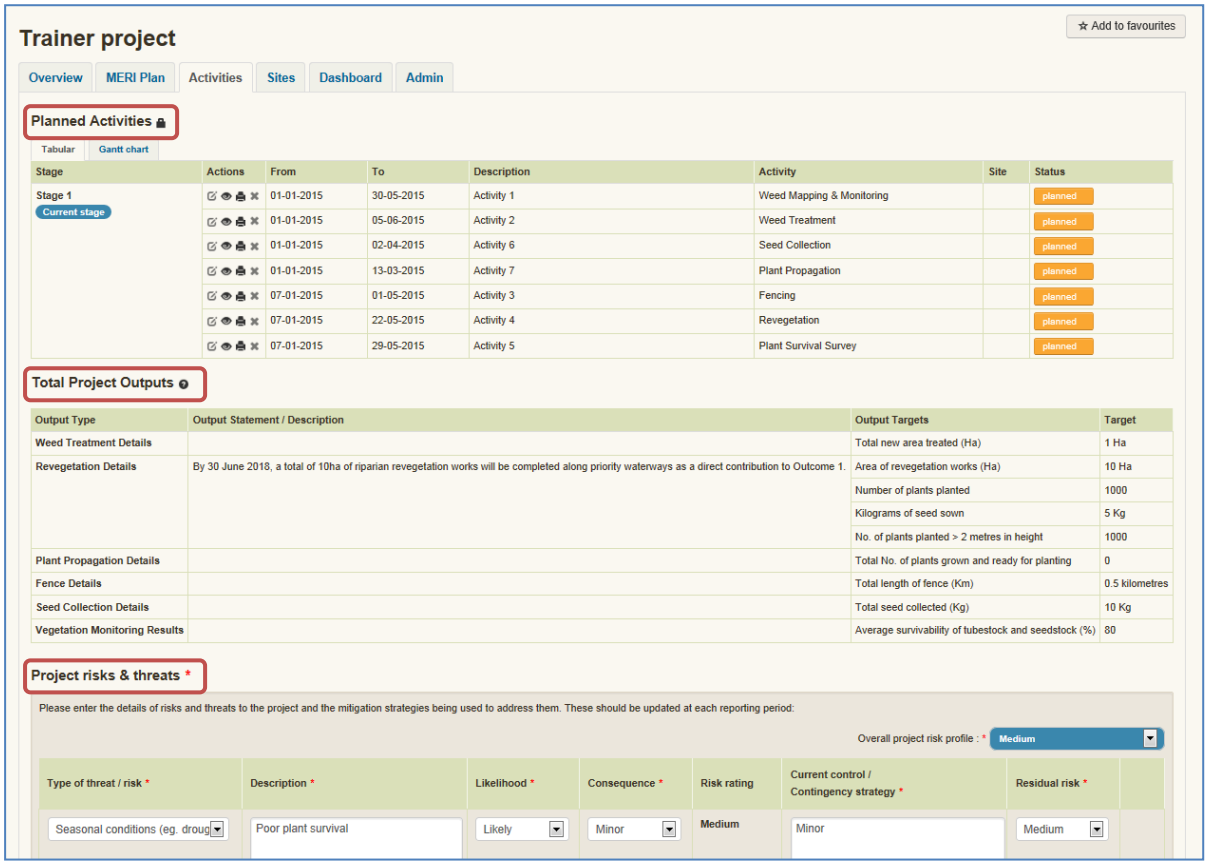
3. Click the **Admin / MERI Plan** sub-tab. Note that the phase indicates the plan is not yet approved.



4. Scroll to the bottom of the page and click **Submit for approval**. Notice the phase has now changed to 'This plan has been submitted for approval'.



5. Click the **Activities** tab. Notice that the Planned Activities list is locked and the Total Project Outputs table can no longer be edited. The Project risks & threats section remains editable and can be be updated at any time.



Submitting a report for approval automatically sends an email to the project's Departmental grant manager/s advising the plan is ready to be assessed.

7. ADD A SITE TO A PROJECT

Phase	This plan is not yet approved This plan has been submitted for approval This plan has been approved	
Access Level	☑ **ADMIN**	☒ **EDITOR**

Adding site information to a project gives spatial reference to the data contained in MERIT. Spatially accurate data is more useful for analysis and informing both management and investment decisions.

Sites and points of interest (POIs) are created at the project level and then added to individual activities. Sites can be created and/or added to an activity before or after the project plan has been approved. Please note: MERIT can only show points or shapes for a site, not lines. For example, if you try to load a fence line, it will be displayed in MERIT as either a point or a polygon (shape), not a single line. This is an identified enhancement for future iterations of MERIT.

Currently, only one site can be assigned to an activity form. A site may have multiple POIs. A POI must be created and defined as a 'photopoint' in order to upload an image to an activity (see Information Sheet 8).

Photo points are used to photographically record landscape changes at a specific point on a site over time. They are not to be used for general snapshots of project activity. These kinds of images should be attached to the project as documents (see Information Sheet 11 for instructions on how to attach a document to your project. Also note that people should not appear in photo point images.

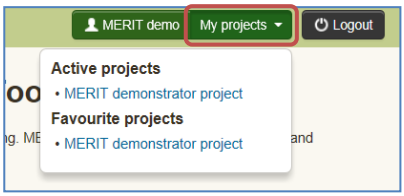
Map navigation within MERIT

Command	Action
Pan	Click and drag mouse
Zoom	Double click mouse, or use the zoom scroll bar at the top left of the map.
Zoom extent	SHIFT + click/drag mouse to draw zoom extent

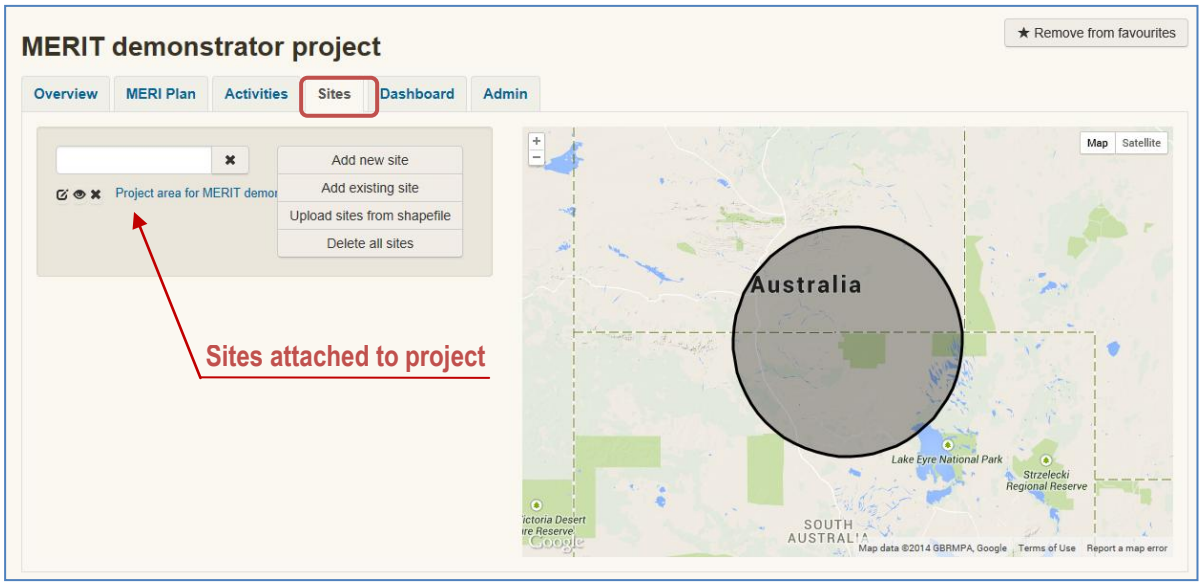
To create a site:

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Sites** tab.



4. Sites already added to the project are listed on the left of the screen. The location of those sites are shown on the map.

5. There are 3 ways you can add a site to a project:

   a) **Add a new site**: use MERIT's GIS tool to create a new site

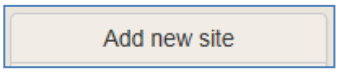
   b) **Add existing site**: choose an existing site that has already been created and attached to another project in MERIT.

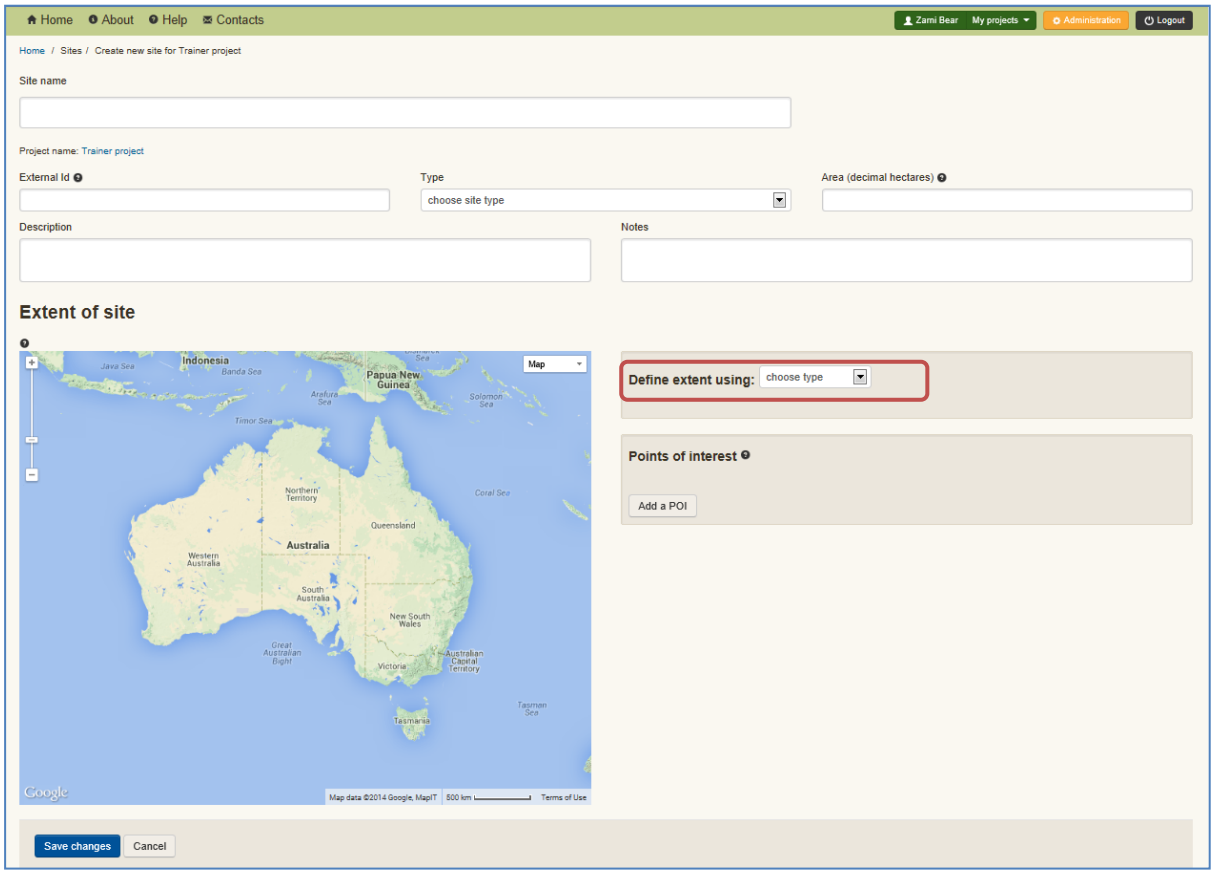
   c) **Upload sites from shapefile**: upload a shapefile created in other GIS software

7.1 Add a new site

1. Navigate to the project's **Sites** tab (Section 7, steps 1 to 3).

2. Click the **Add new site** button.





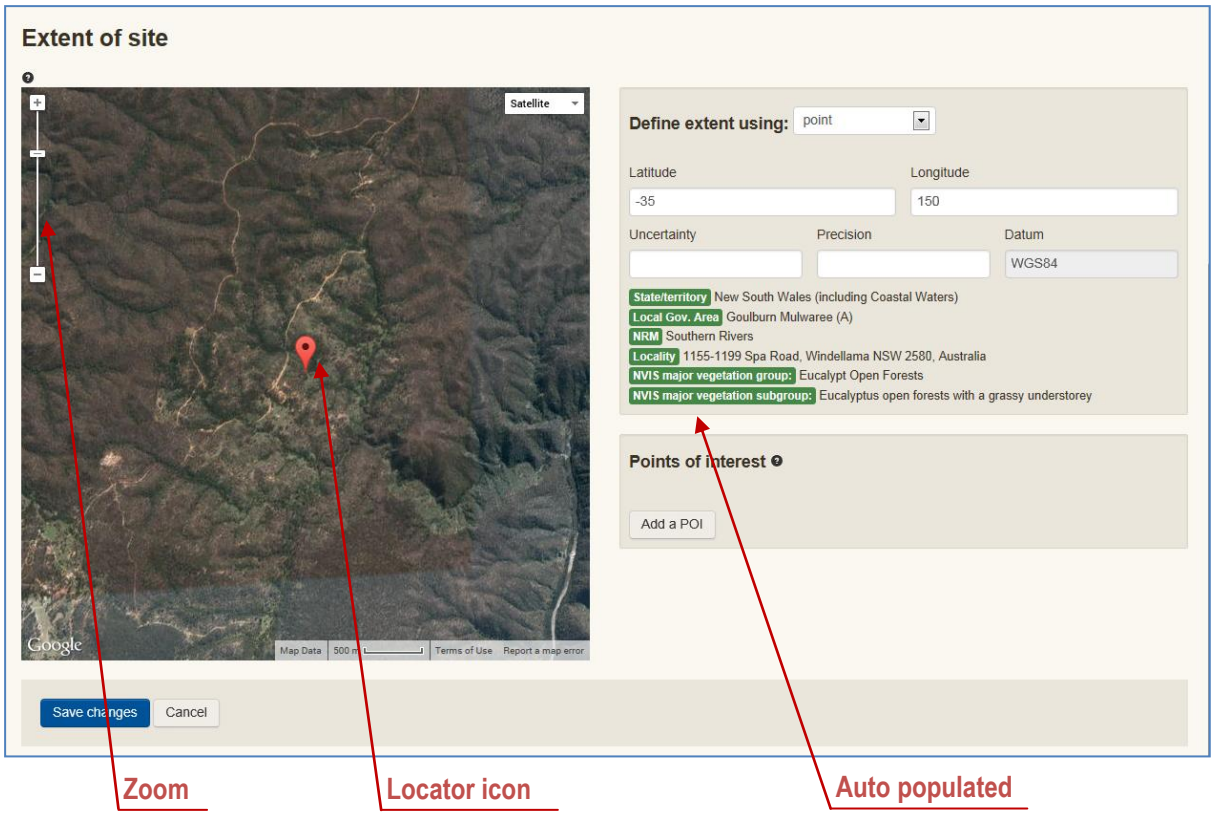
3. Complete the form using the free text fields and drop down lists. There are 3 ways to define the extent of the site: point, known shape, draw a shape.

7.1.1 Define extent: point

4. If you know the latitude and longitude of your site (in decimal degrees), enter them into the respective text boxes. Use your mouse or tab key to move the cursor into the next text box. Don't forget to include the minus (-) to the latitude because we are in the southern hemisphere.

If you don't know the latitude and longitude, enter -35 for the latitude and 150 for the longitude.

5. Click your mouse onto the map. The data highlighted in green will be automatically populated according to the location of the point. The map will zoom to show the point, which is indicated with a red locator icon.

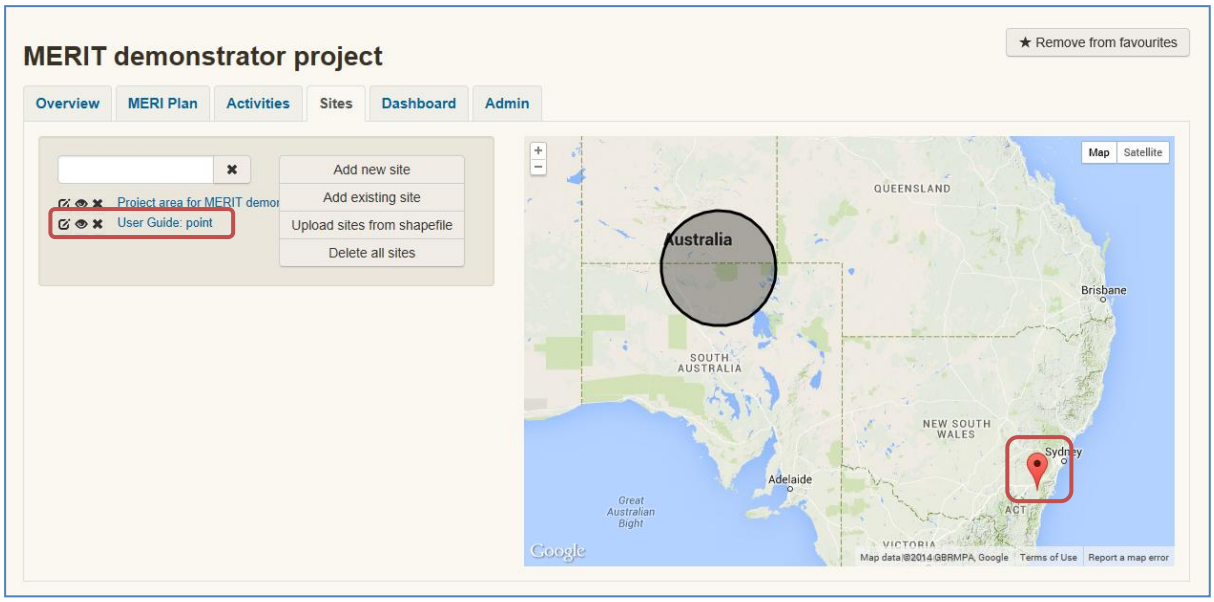


6. Use the zoom function (left side of map) and clicking and dragging the locator icon to refine the position of the point. Your mouse cursor will change to a hand symbol when you can click and drag.

7. An easy way to zoom in to your point, is to move your mouse cursor close to the locator icon and double click. Keep double clicking until you have reached a satisfactory level of magnification.

8. Click **Save changes**.

9. The site will be added to the project's list of sites and map.

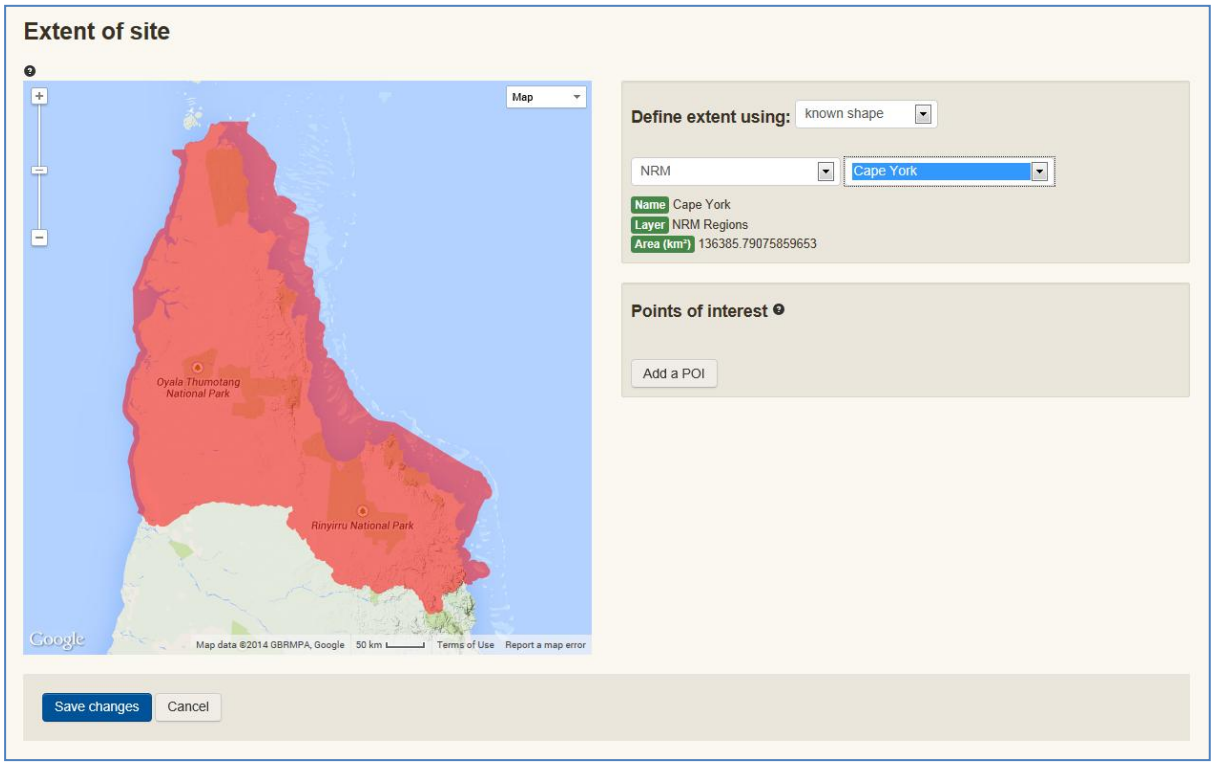


7.1.2 Define extent: known shape

10. Choose a layer from the drop down list: NRM, IBRA 7 Region, IBRA 7 Subregion, Australian State or Local Government Area.

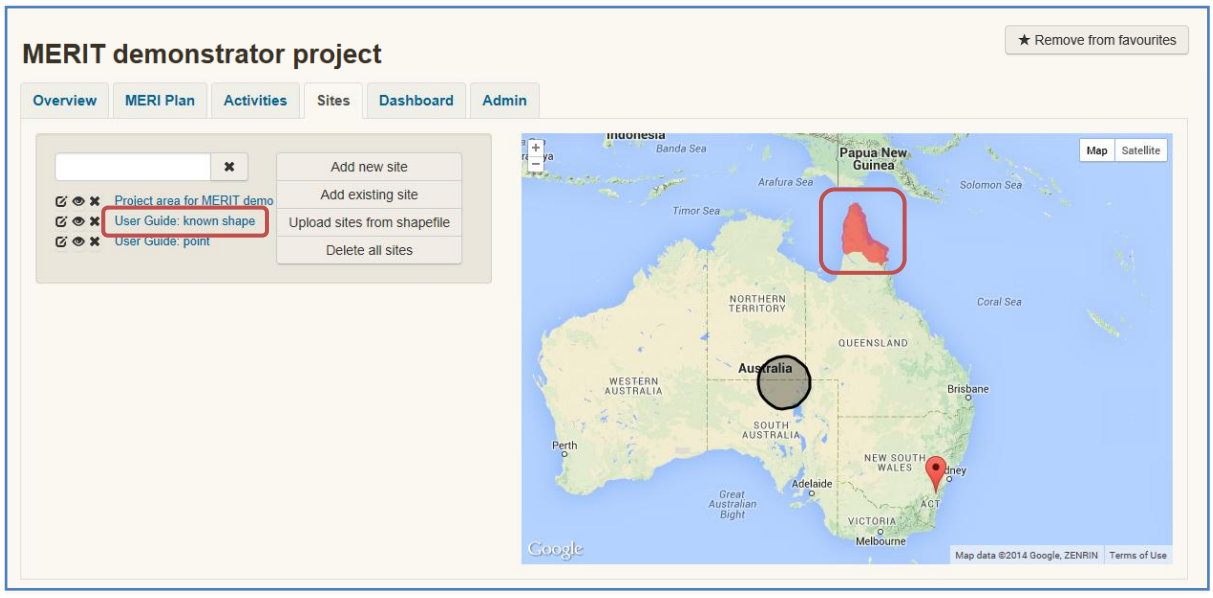
11. Then choose a shape from the drop down list.

12. The data highlighted in green will be automatically populated according to the layer and shape chosen. The map will zoom to show the extent of the shape.



13 Click **Save changes**.

14. The site will be added to the project's list of sites and map.

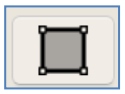


7.1.3 Define extent: draw a shape

15. On the map of Australia, double click the state where your site is located. Keep double clicking on the map to zoom in until you have reached a satisfactory level of magnification. Click and drag the map as necessary.

16 .Choose a tool for drawing your shape:

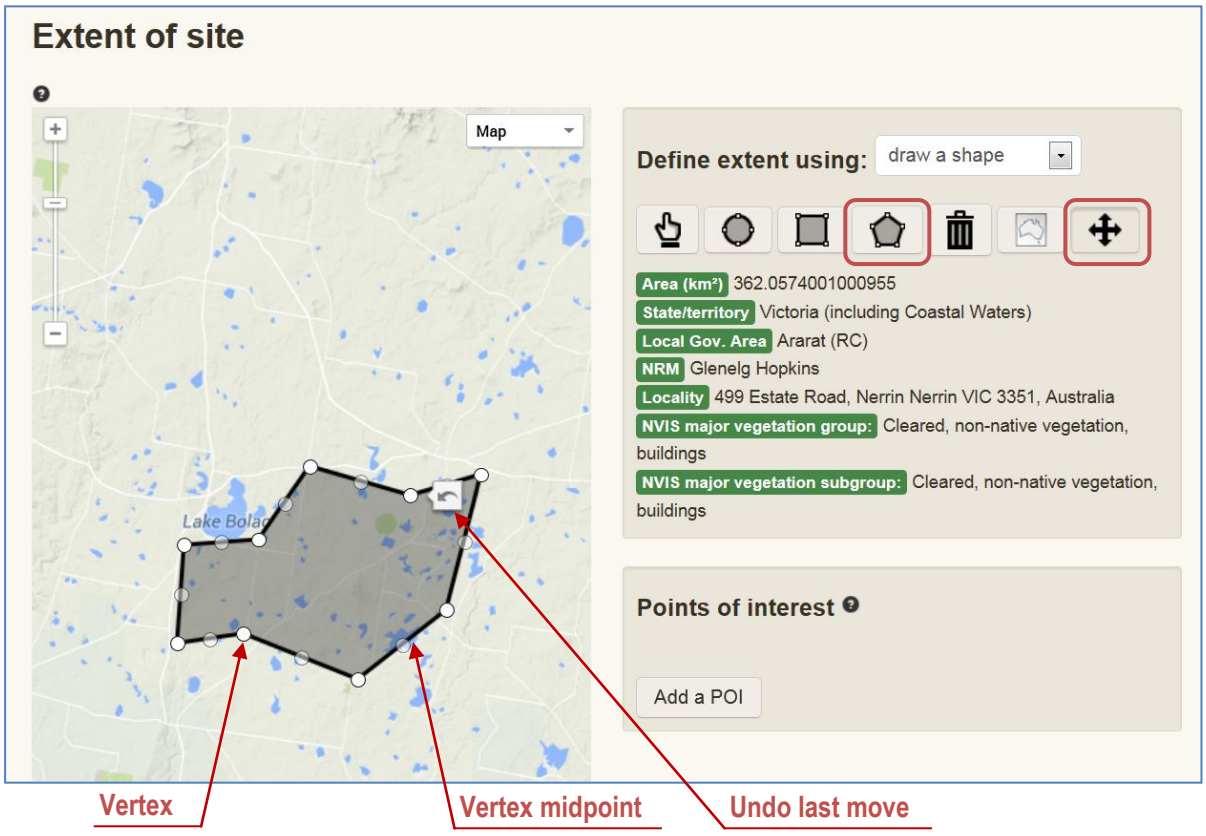
Circle tool: the circle drawn will radiate out from the first click. Only one circle can be drawn.



Square tool: the square drawn will radiate out from the first click. Only one square can be drawn.

Polygon tool: this tool allows a multi-sided shape (polygon) to be drawn. Click any number of times to add the vertices of your shape. Double click the last vertex to close the shape. Wait a few seconds for the shape to close.

If you need to refine the shape of the polygon, click on the button. Then click and drag a vertex (or vertex midpoint) to refine the shape. Click on the arrow to undo the last move. Only one polygon can be drawn.



17. The data highlighted in green will be automatically populated according to the layer and shape chosen.

18. There are other buttons that may help in defining your shape:

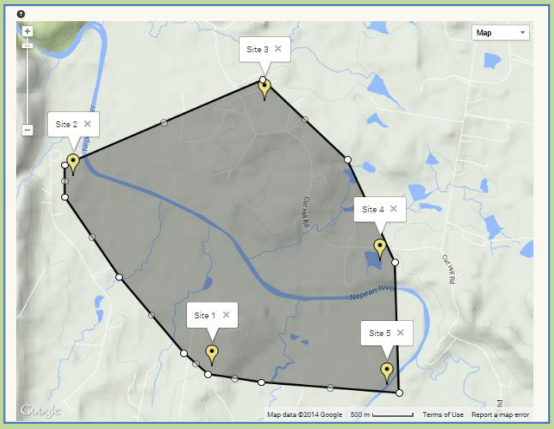
Pointer tool: click and drag on the map to move. Double click on map to zoom in.

Delete: this tool will delete the shape drawn.

Expand: zoom and centre map on Australia

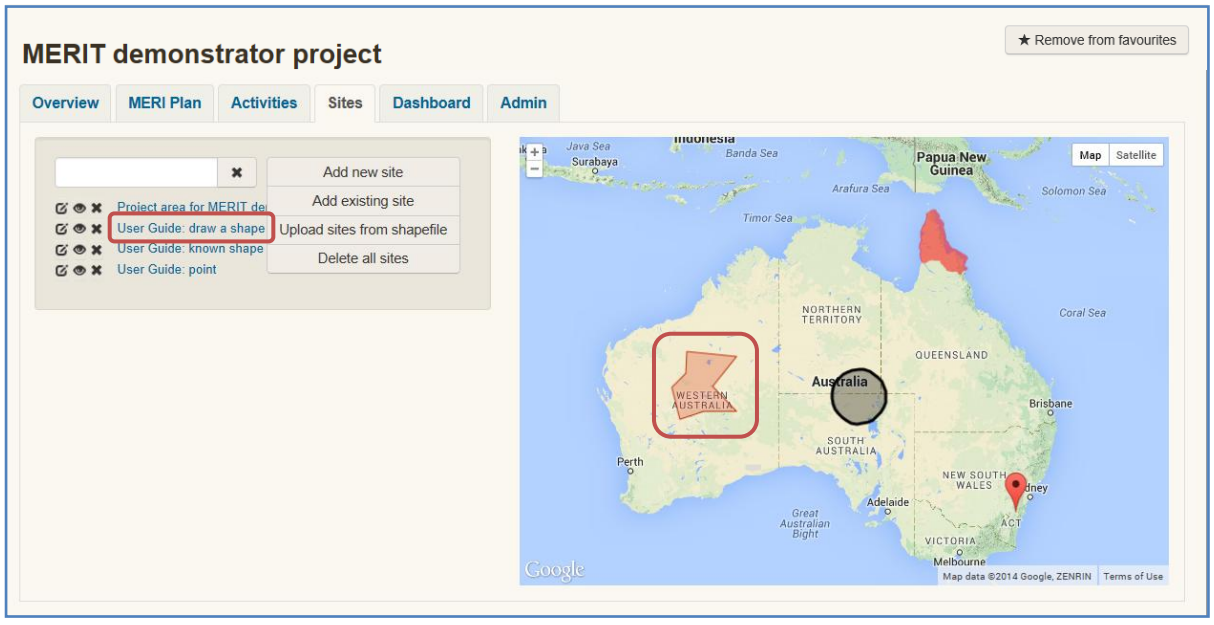
Extent: zoom and centre map on extent of drawn shape.

If your activity form aggregates data across multiple field sites, draw one polygon that encompasses all of the sites and add points of interest (POIs) to represent the location of each field site.



19. Click **Save changes**.

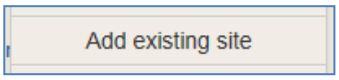
20. The site will be added to the project's list of sites and map.



7.2 Add existing site

1. Navigate to the project's **Sites** tab (Section 7, steps 1 to 3).

2. Click the **Add existing site** button.

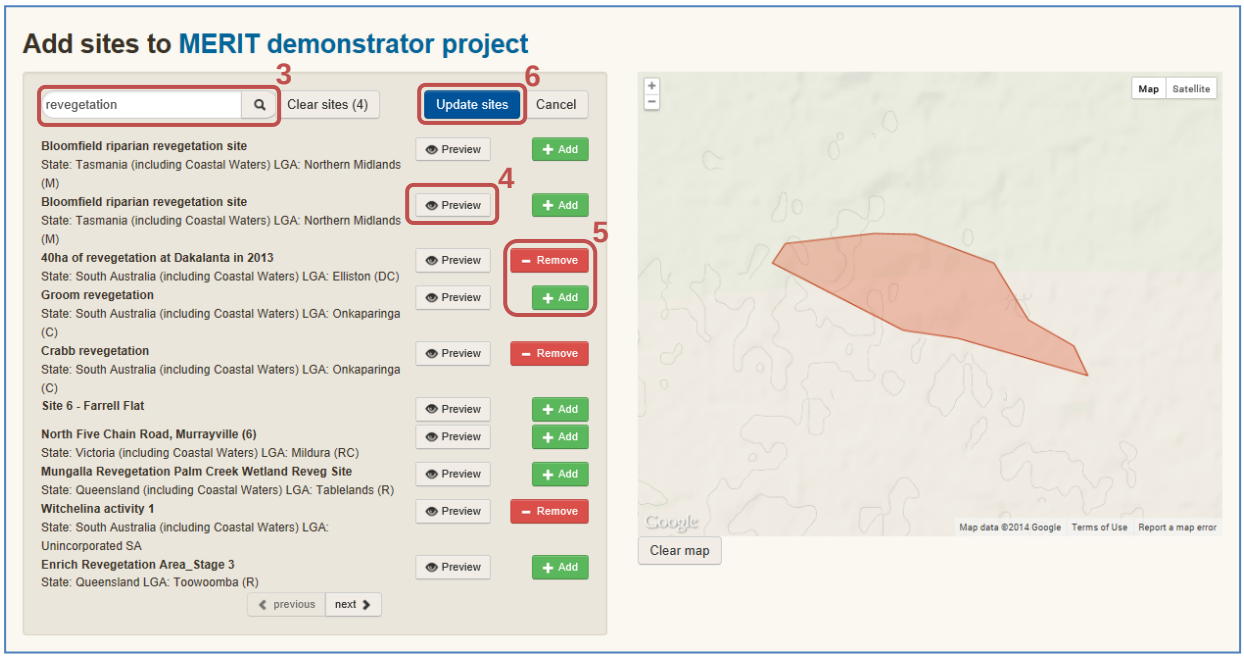


3. Refine the list of sites by typing a search term into the search tool. Click the magnifying glass to run the search.

4. Click the **Preview** button to show the extent of the site on the map.

5. Click the **+Add** button to tag a site to be added to your project. You can add more than one site at a time. Click the **-Remove** button to untag a site.

6. Once you have tagged the sites you wish to add, click the **Update sites** button.



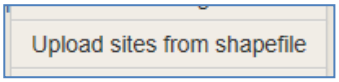
7. The site/s you chose will be added to the project's list of sites and map.

Clicking the **Clear sites** button **deletes all sites** currently attached to the project!

7.3 Upload sites from shapefile

You can also add a site to a project by uploading a shapefile that has been generated with other GIS software.

1. Navigate to the project's **Sites** tab (Section 7, steps 1 to 3).
2. Click the **Upload sites from shapefile** button.



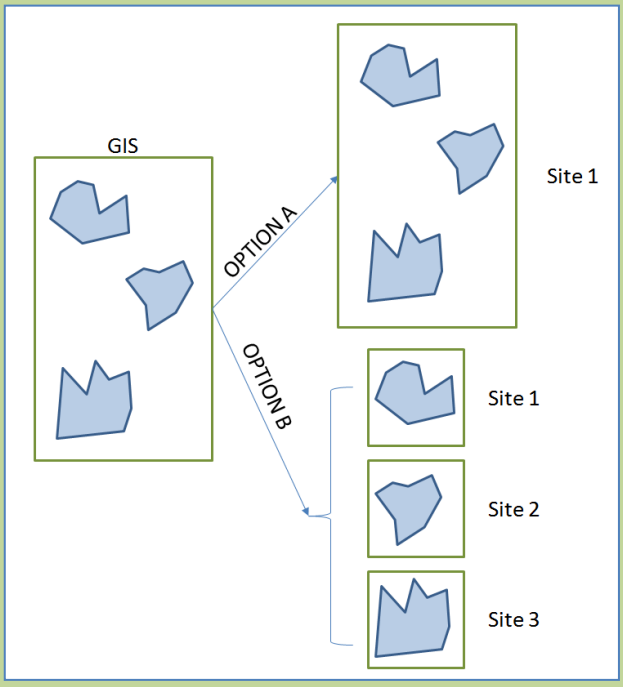
3. Click the **Browse** button and navigate to the file location.

MERIT now recognises shapefiles in a range of formats (coordinate reference systems), rather than only WGS84 (ESPG 4326).

A complete shapefile consists of a .shp file and a set of component files (.sbx, .pjr, .dbf etc). The software used to create the shapefile determines the number and type of component files.

MERIT requires the complete shapefile, including all component files, to be uploaded in order for it to display properly. The easiest way to do this is to zip the complete shapefile (the .shp plus all of the component files) into a single file prior to uploading into MERIT.

Although only one 'site' can be assigned to an activity in MERIT, a 'site' shapefile generated with other GIS software can comprise multiple polygons or points, each representing a site in the field. This may be useful if your activity form aggregates data across multiple field sites. Select the appropriate saving method in your GIS software depending on whether you want the upload to MERIT to consist of one site comprising many polygons (Option A) or multiple unique sites (Option B).



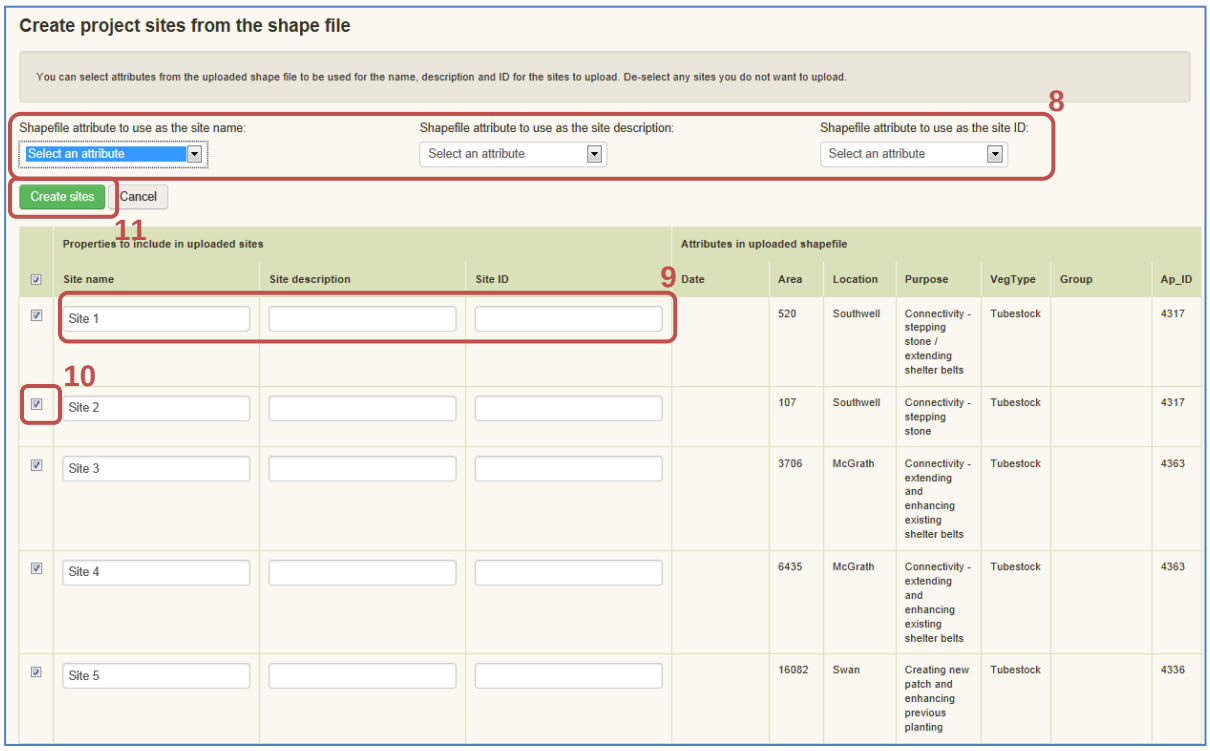
It is a good idea to name (label) each feature prior to uploading into MERIT. Otherwise, MERIT will display the shapefile as multiple unidentified polygons/points.

4. Select the zipped shapefile, then click **Open** (all component files in zip format – see above).

5. Click **Upload Shapefile**.

6. If your shapefile consists of single or multiple polygons representing one site (Option A), it will be added to the project's list of sites and map.

7. If your shapefile consist of multiple polygons that are to be uploaded as multiple unique sites (Option B), the following screen will be opened:



8. Choose the attribute you wish to use as the site name, site description and site ID from the relevant drop down lists (if already defined when the shapefile was created in your GIS software).

9. Alternatively, type a site name, description and ID into the text boxes for each site.

10. De-select any sites you do not want to upload by unticking the box next to the relevant site.

11. Click **Create sites**.

12. The shapefile you chose will be added as multiple unique sites to the project's list of sites and map.

7.4 Viewing / Editing / Deleting Sites

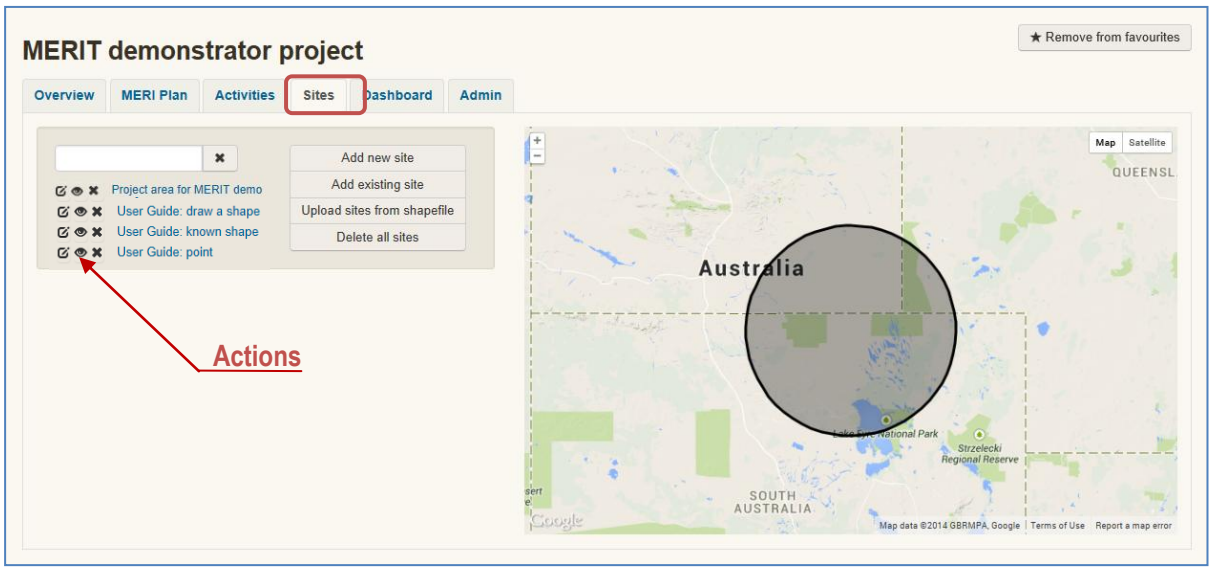
There are 3 actions for a site attached to a project:

Edit View Delete

Sites can be viewed/edited/deleted from a project during any phase.

1. Navigate to the project's **Sites** tab (Section 7, steps 1 to 3).

2. Click the relevant icon next to the site you wish to edit/view/delete.



7.4.1 Edit a site

3. To edit a site associated with a project, click Edit . Make the necessary changes and click **Save changes**. Refer to Section 7.1 for instructions on how to refine the location or shape of your site.

7.4.2 View a site

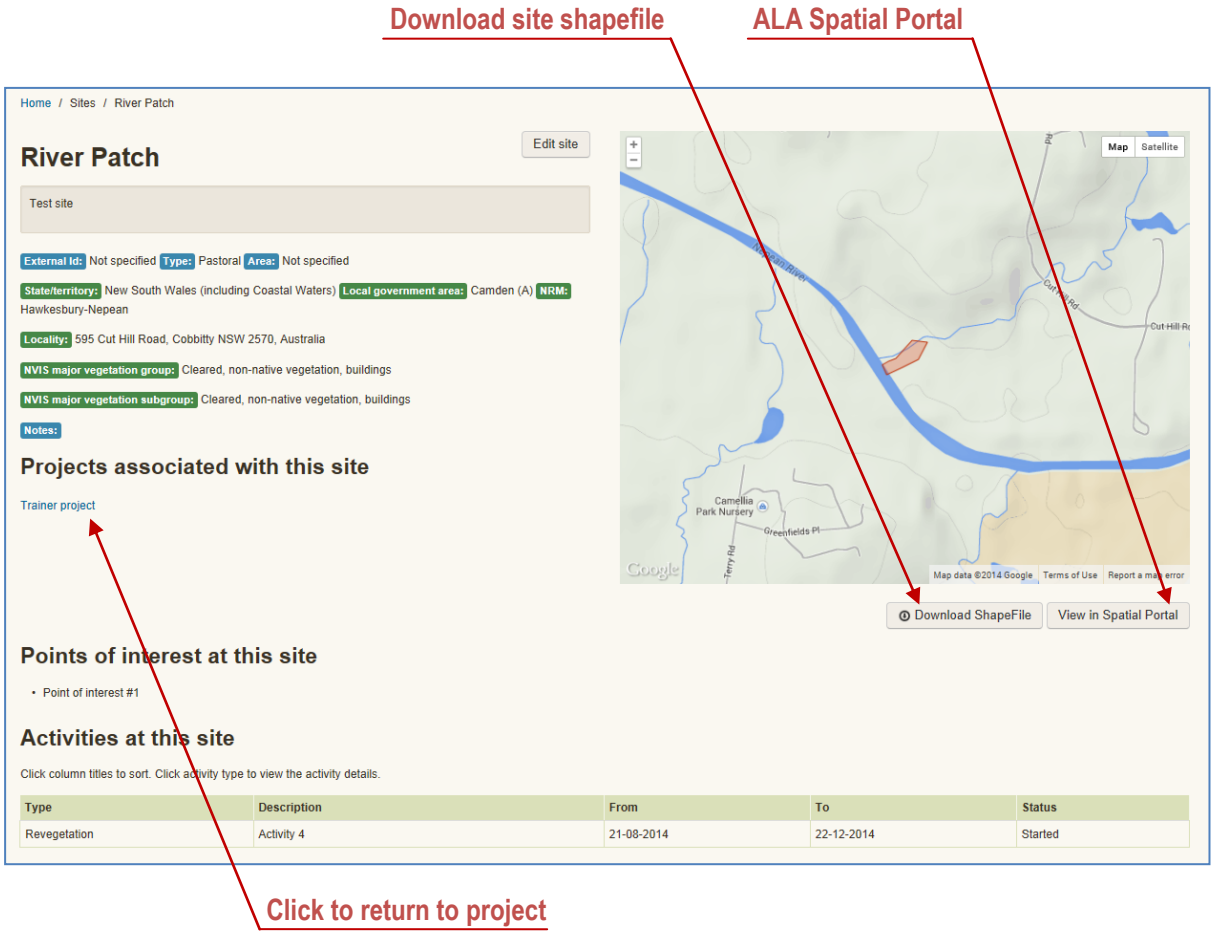
4. To explore a site associated with a project, click **View** .

This view displays the site information, plus the projects, points of interest (POIs) and activities associated with the site. See Information Sheet 8 for more information on POIs.

Location data for the site can be downloaded as a shapefile by clicking **Download ShapeFile** under the map and follow the instructions.

The shapefile can also be viewed using the Atlas of Living Australia's spatial portal by clicking **View in Spatial Portal** under the map. This feature enables users to consider the site in relation to hundreds of different spatial layers contained in the ALA portal.

Click the project's name in the list under **Projects associated with this site**, to return to your project.

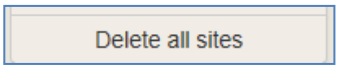


7.4.3 Delete a site from a project

Deleting a site from a project breaks the association between it and any activities to which it is attached. The site, **and any associated photopoint data/images**, will be removed from the relevant activity/ies. Deleting a site/s from one project does not delete it from other projects to which it may be attached.

5. To delete a site associated with a project, click **Delete** .

6. To delete all sites associated with a project click **Delete all sites**.

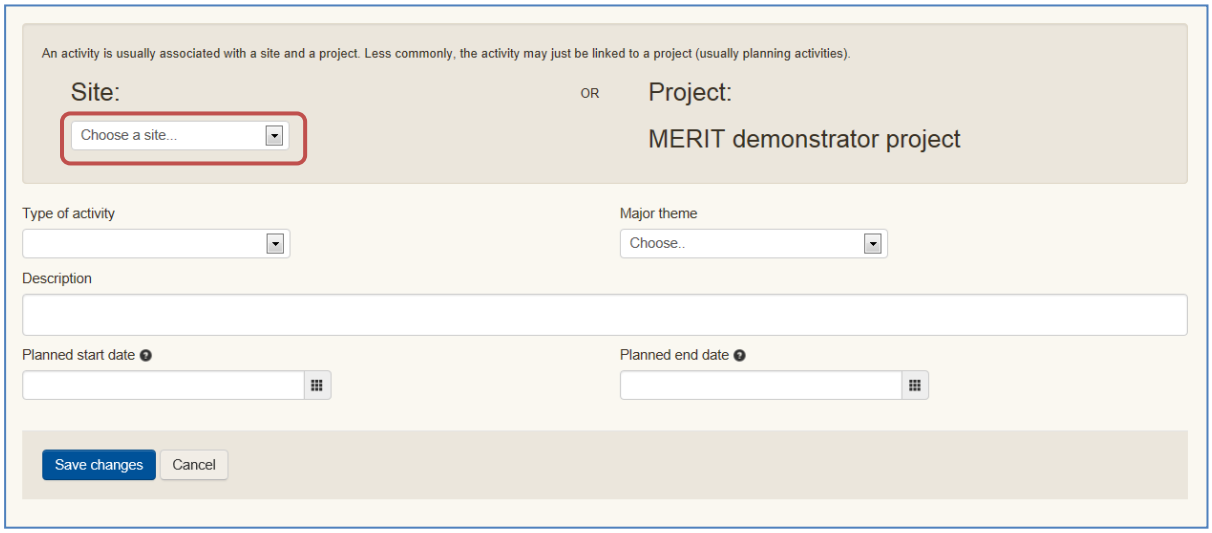


7.5 Add site to an activity

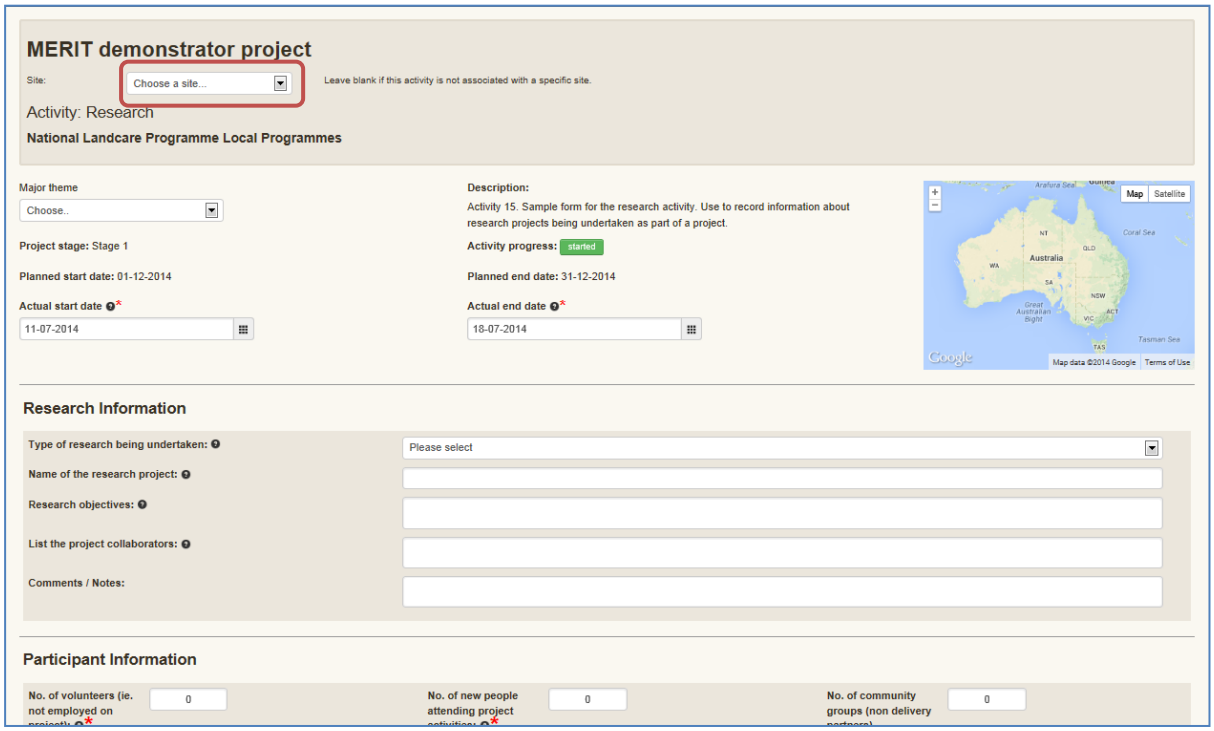
A site can be added to an activity during 2 phases:

1. Navigate to the projects **Activities** tab (Section 7, Steps 1 to 3).

2. If you are creating the project plan (i.e. This plan is not yet approved), click **+Add new activity** button and choose the site from the relevant drop down list in the activity form (See Information Sheet 5).



3. If you are adding data to your project report (i.e. This plan has been approved), click Edit for the activity to want to add the site to, and choose the site from the relevant drop down list in the activity form (See Information Sheet 9).


MERIT demonstrator project
Site:
Choose a site...
Leave blank if this activity is not associated with a specific site.
Activity: Research
National Landcare Programme Local Programmes
Major theme
Choose..
Description:
Activity 15. Sample form for the research activity. Use to record information about research projects being undertaken as part of a project.
Project stage: Stage 1
Activity progress: started
Planned start date: 01-12-2014
Planned end date: 31-12-2014
Actual start date
11-07-2014
Actual end date
18-07-2014
Research Information
Type of research being undertaken:
Please select
Name of the research project:
Research objectives:
List the project collaborators:
Comments / Notes:
Participant Information
No. of volunteers (ie. not employed on
No. of new people attending project
No. of community groups (non delivery

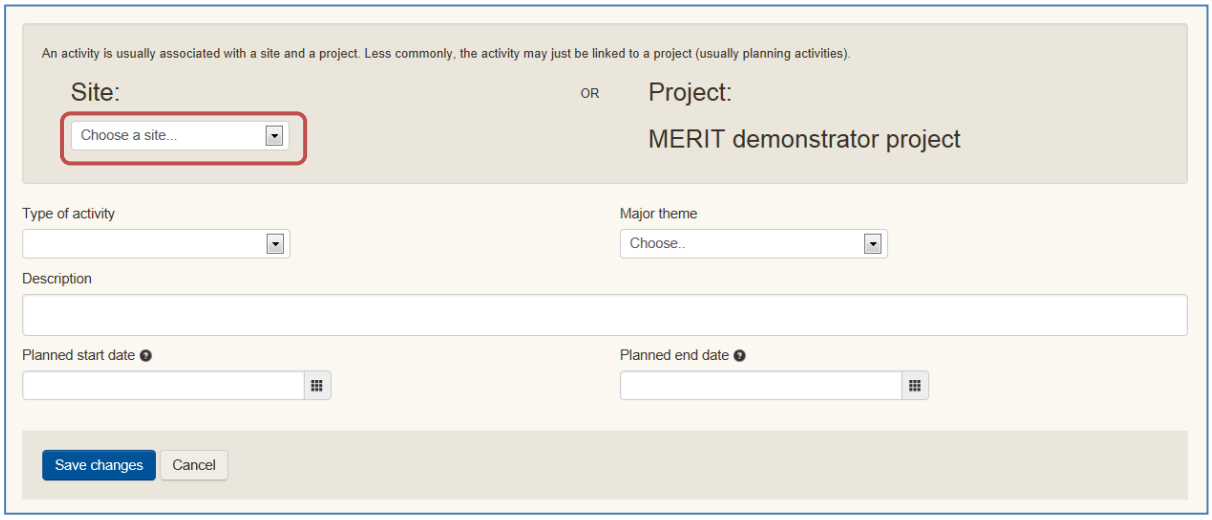
7.6 Change / delete a site from an activity

Deleting or changing an activity's site will also remove any photopoint images that may have been added to the activity. Deleting a site from one activity does not delete it from other activities or projects to which it may be attached.

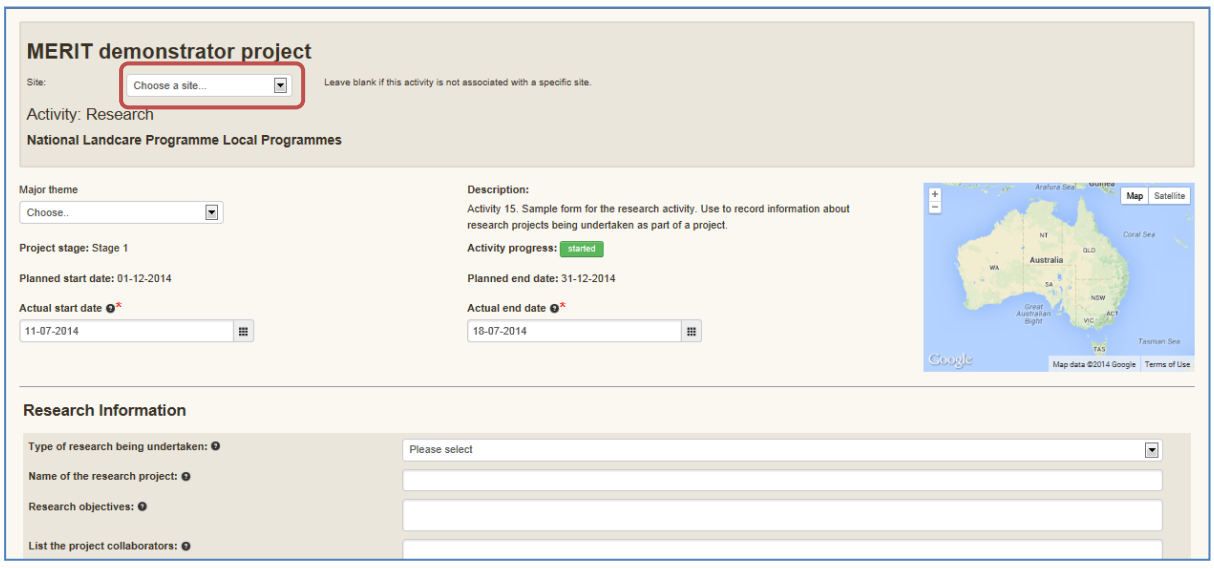
A site can be changed or deleted from an activity during 2 phases:

1. Navigate to the projects **Activities** tab (Section 7, Steps 1 to 3).

2. If you are editing the project plan (i.e. This plan is not yet approved), click Edit for the activity to want to change, and choose an alternate site from the relevant drop down list in the activity form (See Information Sheet 5). Select the option 'Choose a site' if you do not want a site associated with the activity.



3. If you are adding data to your project report (i.e. This plan has been approved), click Edit for the activity to want to change and choose an alternate site from the relevant drop down list in the activity form (See Information Sheet 9). Select the option 'Choose a site' if you do not want a site associated with the activity.



8. ADD POINTS OF INTEREST TO A SITE

Phase	This plan is not yet approved This plan has been submitted for approval This plan has been approved	
Access Level	☑ ADMIN	☑ EDITOR

Points of Interest (POIs) can be added to sites and are most commonly used to record the location of photo points or threatened species. Photo point images can provide a visual representation of vegetation change over time, especially when photos taken from the same location are compared across different time periods.

Photo points are used to photographically record landscape changes at a specific point on a site over time. They are not to be used for general snapshots of project activity. These kinds of images should be attached to the project as documents (see Information Sheet 11 for instructions on how to attach a document to your project). Also note that people should not appear in photo point images.

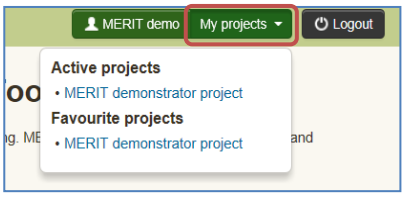
POIs can be added at the same time or after the site is created/added to the project. Refer to Appendix A for more information on photopoint photos.

There are two ways to add a POI to a site:

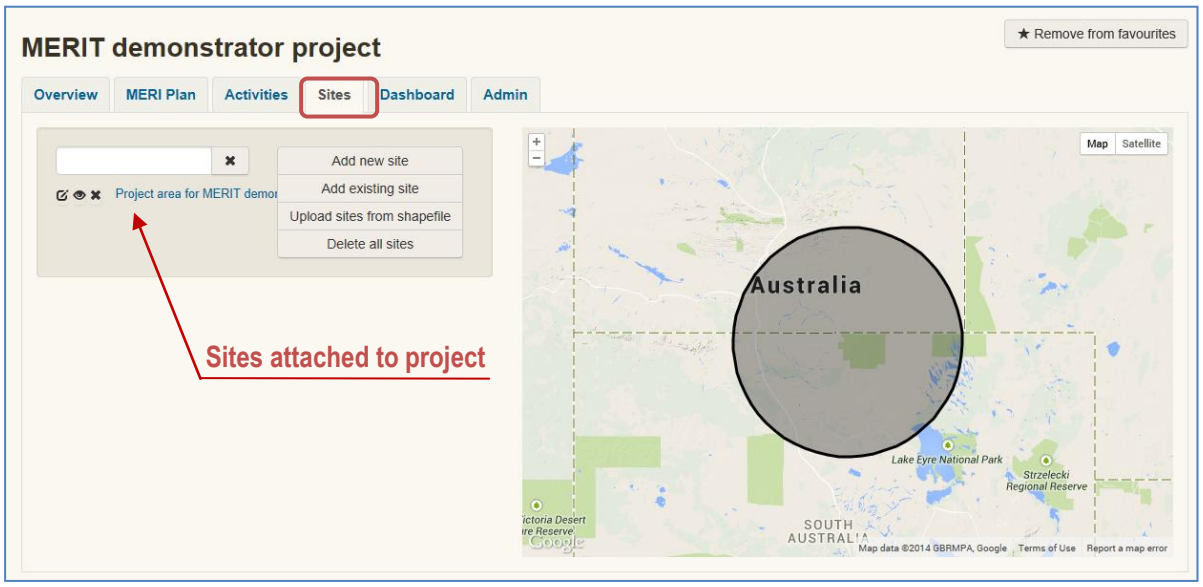
8.1 Via the Sites tab

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Sites** tab.



4. Either:

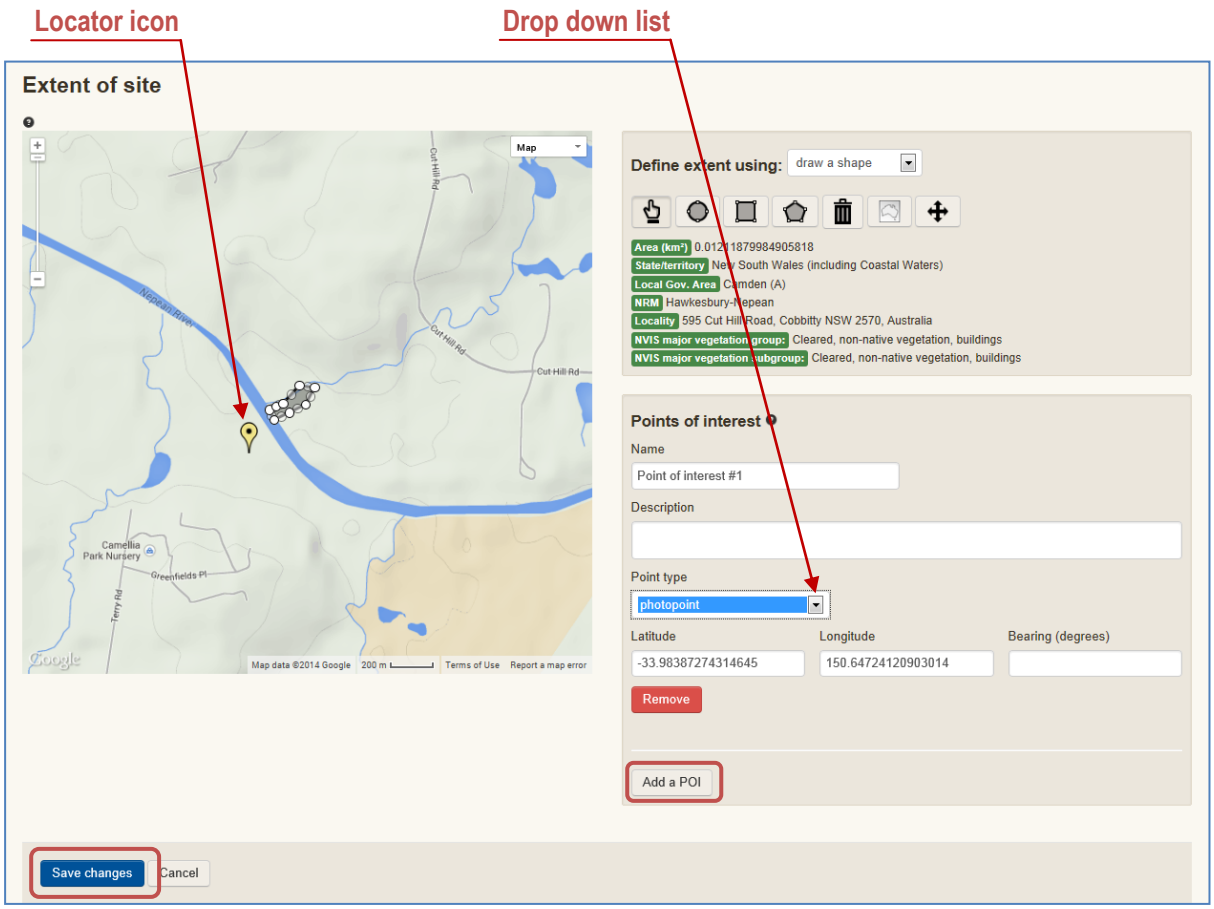
   a) click **Edit** for the site you wish to add the POI to; or

   b) click **Add new site** button to create a new site (refer to Information Sheet 7 for instructions on adding a new site).

5. Scroll to the bottom of the page and click **Add a POI** in the Points of Interest box.

6. Fill in the free text boxes and choose **photopoint** from the point type drop down list.

7. Click and drag the yellow locator icon on the map to where the photo point is located (or enter the latitude and longitude (in decimal degrees)). Enter the bearing (degrees) for the direction the photo is taken. Click **Add a POI** if you have more than one POI to add.



POIs need to be added individually. They cannot be uploaded from an existing shapefile or spreadsheet.

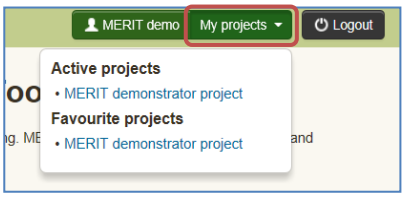
8. Click **Save changes** at the bottom of the page.

8.2 Via an activity form

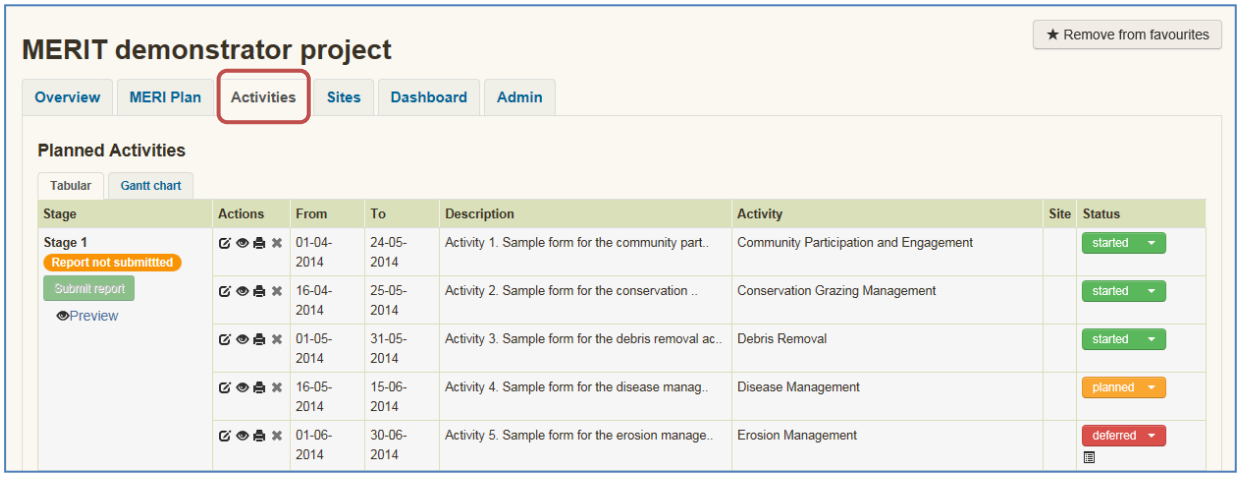
You can only add a POI to a site via an activity form if the project has been approved (i.e. your project is in 'reporting' mode).

9. Log in to MERIT.

10. Click the **My Projects** button on the menu bar. Select the relevant project.

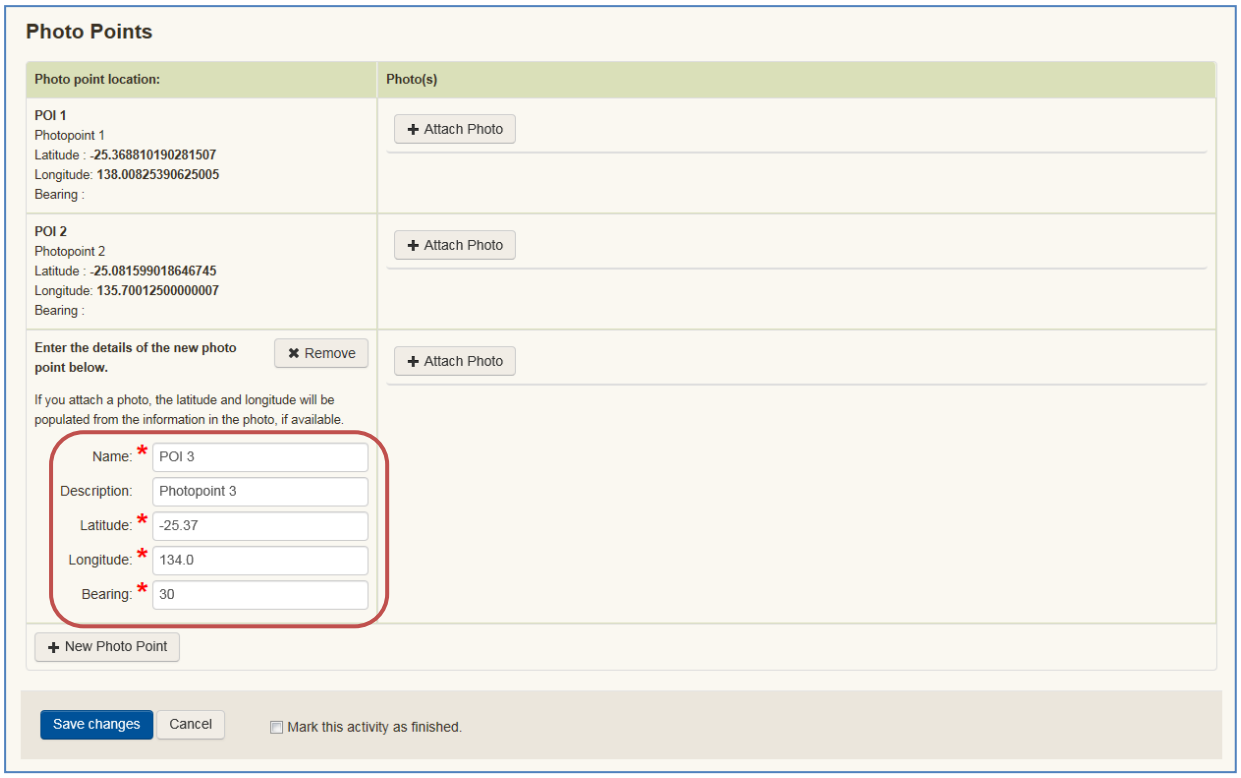


11. Click the **Activities** tab.



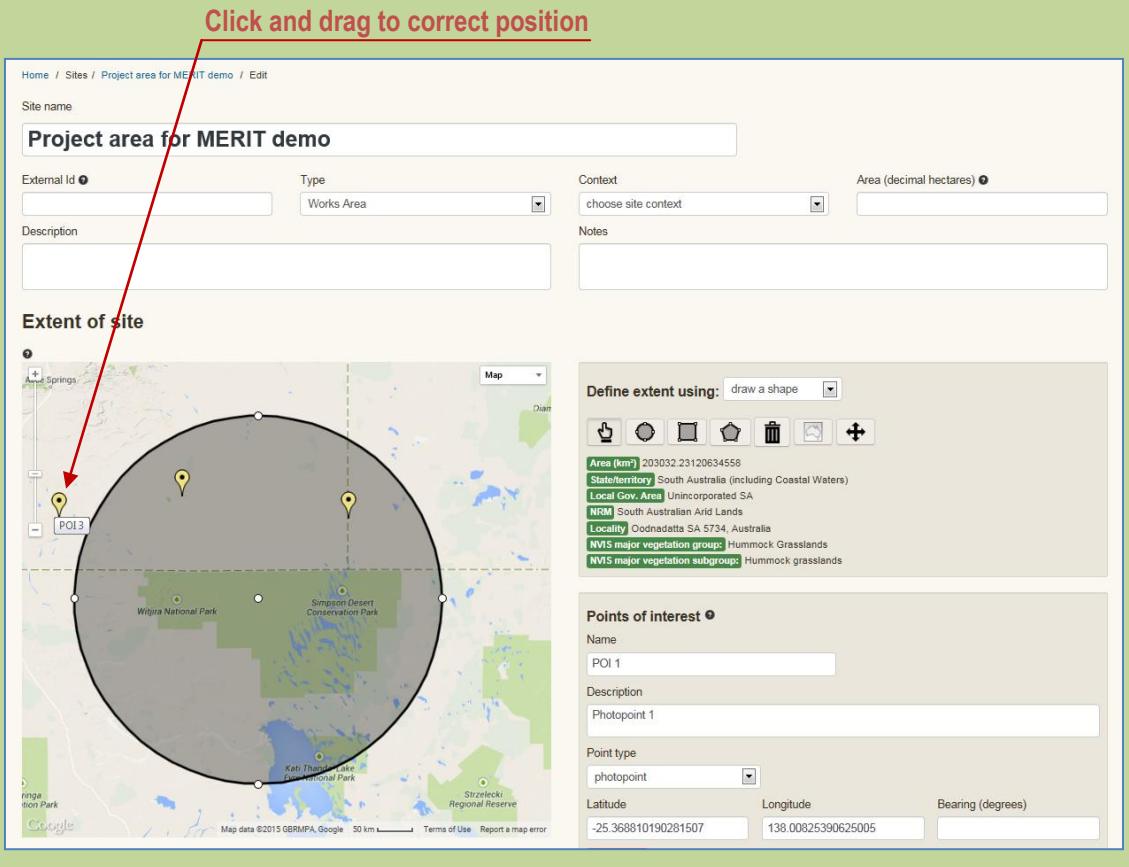
12. Click **Edit** for the activity you wish to add the POI to. Ensure a site has been assigned to the activity.

13. Scroll to the bottom of the activity form. POIs already added to the project will appear under the Photo Points section. To add a new POI, click **+ New Photo Point**.



14. Enter the name, latitude, longitude and bearing for the POI. Click **Save changes**.

If you don't know the latitude and longitude for the POI, enter a location similar to existing POIs. Then edit the site via the Sites tab and click and drag the yellow POI locator icon to the correct position.

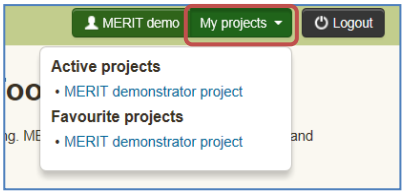


9. PROJECT REPORTING – ADD DATA

Phase	This plan has been approved	
Access Level	☑ ADMIN	☑ EDITOR

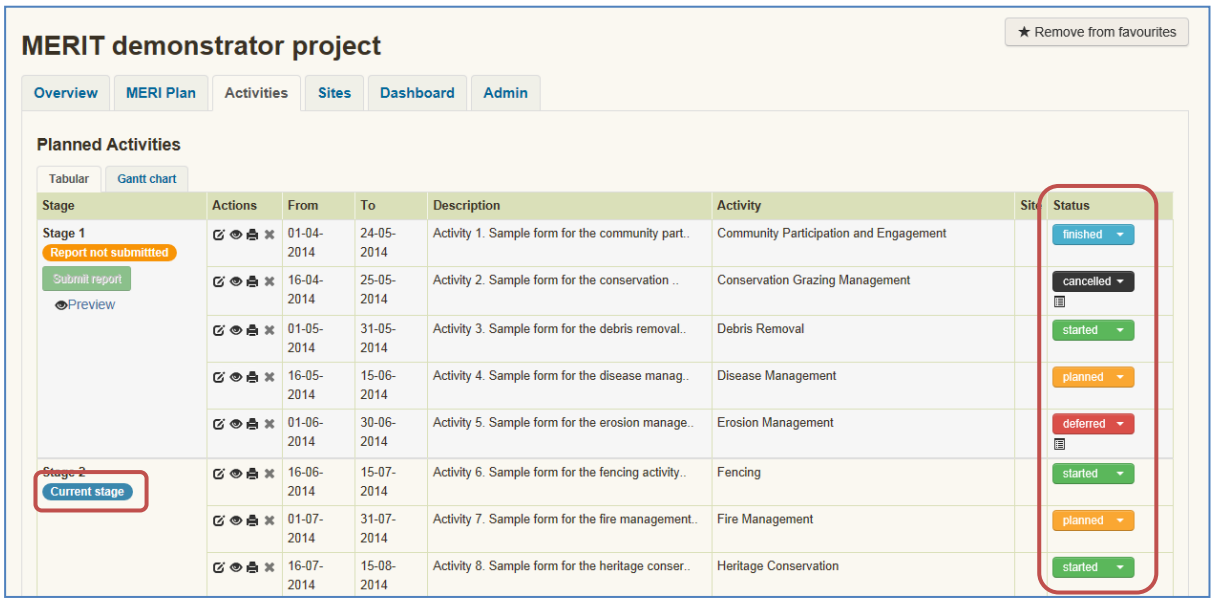
Once your project plan has been submitted and approved, you can add data into the activity forms. This is known as 'project reporting'.

1. Log in to MERIT.



2. Click the **My Projects** button on the menu bar. Select the relevant project.

3. Click **Activities** tab and scroll to the Planned Activities section. The current reporting period will be indicated by the Current stage tag in the 'stage' column. Activities that do not contain data will have a status of 'planned'.



The status of an activity can be:

Planned: an activity that has been included in the project MERI plan but has not yet commenced.

Started: an activity that has been included in the project MERI plan and reporting on the activity has commenced.

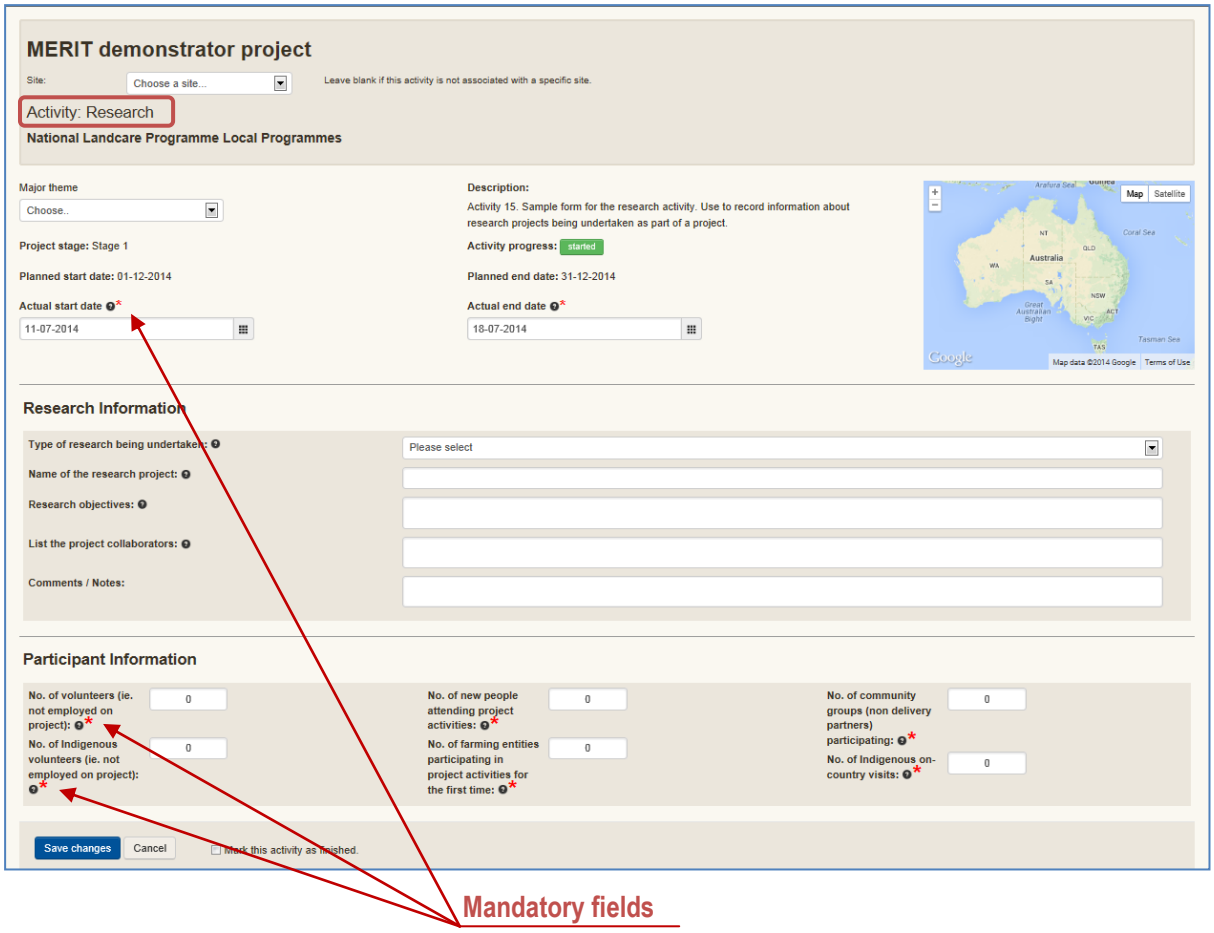
Finished: an activity that has been included in the project MERI plan, all necessary actions to complete the activity have been undertaken and reporting on the activity is complete. Click the status drop down box in the activities list or tick the '*Mark this activity as finished*' box at the bottom of the activity form.

Deferred: an activity that has been included in the project MERI plan and was scheduled to occur within a specific stage, but will now occur in a later stage. Click the status drop down box in the activities list to change. A reason for deferring the activity will need to be entered in the pop-up box.

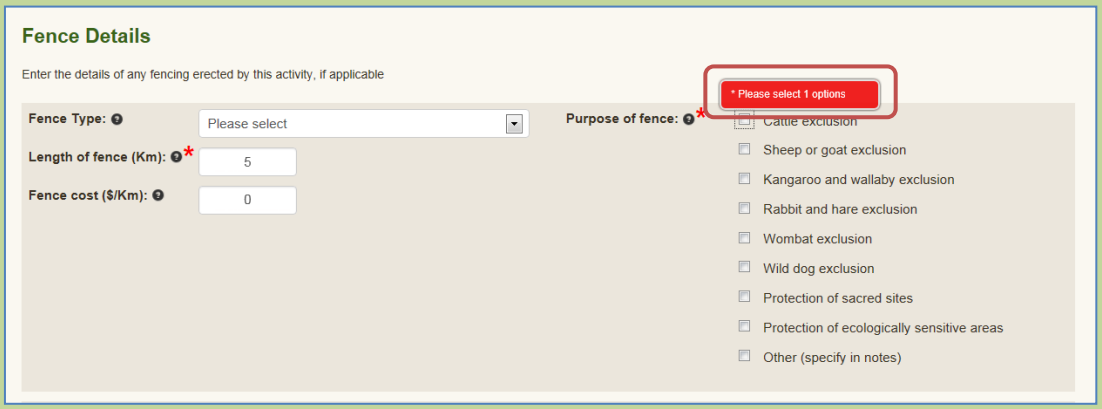
Currently, a new form will need to be manually added to the relevant stage to capture the data for the deferred activity. The Grant Manager will need to click **Modify MERI Plan** on the Admin/MERI Plan sub-tab in order to unlock the project and allow the recipient to add the new activity form. The plan will need to be resubmitted and approved. Refer to the MERIT Process flowchart. A future enhancement to MERIT will be that, when deferred, a new activity will be automatically generated for the following stage.

Cancelled: an activity that has been included in the project MERI plan and was scheduled to occur, but will no longer be undertaken as part of the project. A reason for cancelling the activity will need to be entered in the pop-up box.

4. Click **Edit** for the activity in the current stage you want to record data against. Notice that, as the plan has been approved, there are now data fields on the activity form. An example of the 'Research' activity form is below. Mandatory fields are marked with a red asterisk (*).


MERIT demonstrator project
Site:
Choose a site...
Leave blank if this activity is not associated with a specific site.
Activity: Research
National Landcare Programme Local Programmes
Major theme
Choose..
Project stage: Stage 1
Planned start date: 01-12-2014
Actual start date
11-07-2014
Description:
Activity 15. Sample form for the research activity. Use to record information about research projects being undertaken as part of a project.
Activity progress: started
Planned end date: 31-12-2014
Actual end date
18-07-2014
Research Information
Type of research being undertaken:
Please select
Name of the research project:
Research objectives:
List the project collaborators:
Comments / Notes:
Participant Information
No. of volunteers (ie. not employed on project):
No. of Indigenous volunteers (ie. not employed on project):
No. of new people attending project activities:
No. of farming entities participating in project activities for the first time:
No. of community groups (non delivery partners) participating:
No. of Indigenous on-country visits:
Save changes
Cancel
Mark this activity as finished.
Mandatory fields

Mandatory fields must be populated before data in a form can be saved. This ensures that all data related to programme reporting is captured. If you try to save a partially completed form, the unpopulated mandatory fields will be highlighted.



If you notice that the mandatory fields in a form are not relevant to the data you have collected in the field, it is likely the wrong activity form has been chosen when creating the project plan. Contact your Departmental grant manager to discuss modifying your plan.

5. Complete the form with the data collected in the field. Fields can be populated via free text, numbers, drop down lists or tick boxes. Hover your mouse over the icon to read information about that particular field. Refer to **Section 9.1** and **Section 9.2** for more information on methods for entering data.

If you are certain you have entered all the applicable data into the activity form, tick the **Mark this activity as finished box** at the bottom of the page, before completing the next step. Ticking this box automatically changes the status of the activity to 'finished'.

If you need to add data to an activity that has a status of 'finished', either

a) **Edit** the activity, uncheck the Mark this activity as finished box and click **Save changes**, or

b) Select 'started' status from the drop down list for the activity.

6. Click **Save Changes** at the bottom of the screen when all mandatory data has been entered into the form.

7. Note that the status of your project has changed from 'planned' to 'started'. If you added a site to your activity, the site name now appears in the 'site' column of the activities list.

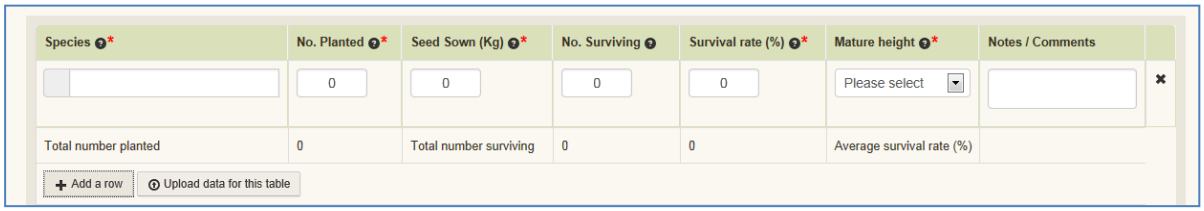
8. Click the **Dashboard** tab. Notice there is now some data against the output targets.

9.1 Create a list – 'nested table'

Many activity forms allow users to add more than one row to a data table if the same action is being performed on multiple things. For example, revegetation using more than one species, or conducting more than one community engagement event during a stage. This functionality is referred to as a 'nested table'. There are two ways you can add data to a nested table:

1) add a row, or

2) upload data from an excel spreadsheet template.

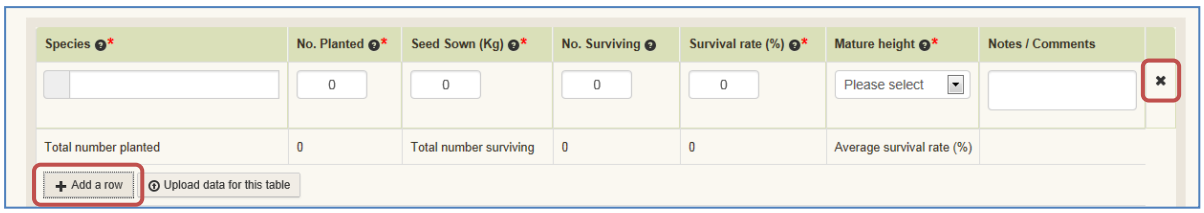


9.1.1 Add a row

9. When entering data (Section 9, Step 5), scroll to the section of the form that contains the nested table. The table will already consist of one row. Complete the data for that row.

10. To add another row, click **Add a row** at the bottom of the nested table. Complete the data for the new row. Continue adding a row until your table is complete.

11. To delete a row, click on the **X** in the last column of the row you want to delete.



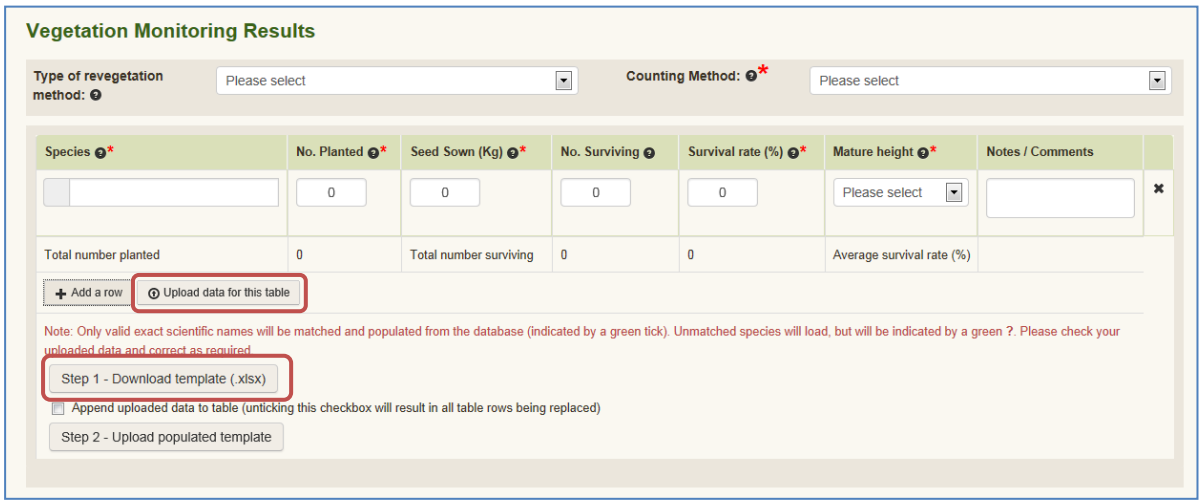
9.1.2 Upload data for a table

Users can also use an Excel spreadsheet to populate their nested table. A template for the spreadsheet must be generated from MERIT in order for this functionality to work. The field names and data values **MUST** correspond to those in the activity form or the template will not upload into MERIT. For non-numerical fields, a drop down box with the value options will be automatically generated.

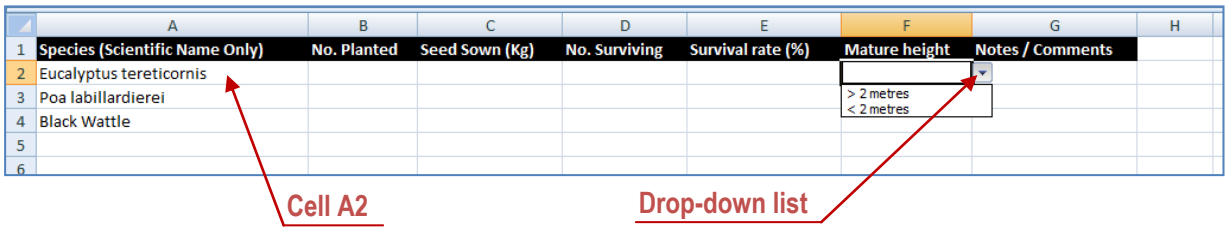
If the same list (i.e. species list) is to be used for more than one activity (i.e. seed collection, revegetation and plant survival survey), generate a separate template for each activity and copy/paste the species list into each.

12. When entering data (Section 9, Step 5), scroll to the section of the form that contains the nested table. Click **Upload data for this table**.

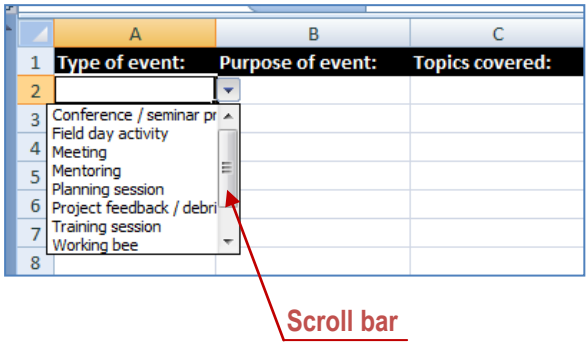
13. Click **Step 1 - Download template**.


Vegetation Monitoring Results
Type of revegetation method:
Please select
Counting Method:
Please select
Species
No. Planted
Seed Sown (Kg)
No. Surviving
Survival rate (%)
Mature height
Notes / Comments
Total number planted
Total number surviving
Average survival rate (%)
Add a row
Upload data for this table
Note: Only valid exact scientific names will be matched and populated from the database (indicated by a green tick). Unmatched species will load, but will be indicated by a green ?. Please check your uploaded data and correct as required.
Step 1 - Download template (.xlsx)
Append uploaded data to table (unticking this checkbox will result in all table rows being replaced)
Step 2 - Upload populated template

14. Microsoft Excel is opened in another window. Complete the table (one species/record per row). The minimum data requirement for the template is column A. You can populate the other columns (from B onwards) either now (in Excel) or after the template has been uploaded (in MERIT).



15. If you click on a cell that consists of a drop-down list, a button appears on the right side of the cell. Click the button, then click the relevant option from the list. If it is a long list, click and drag the scroll bar up/down to scroll through all the options.

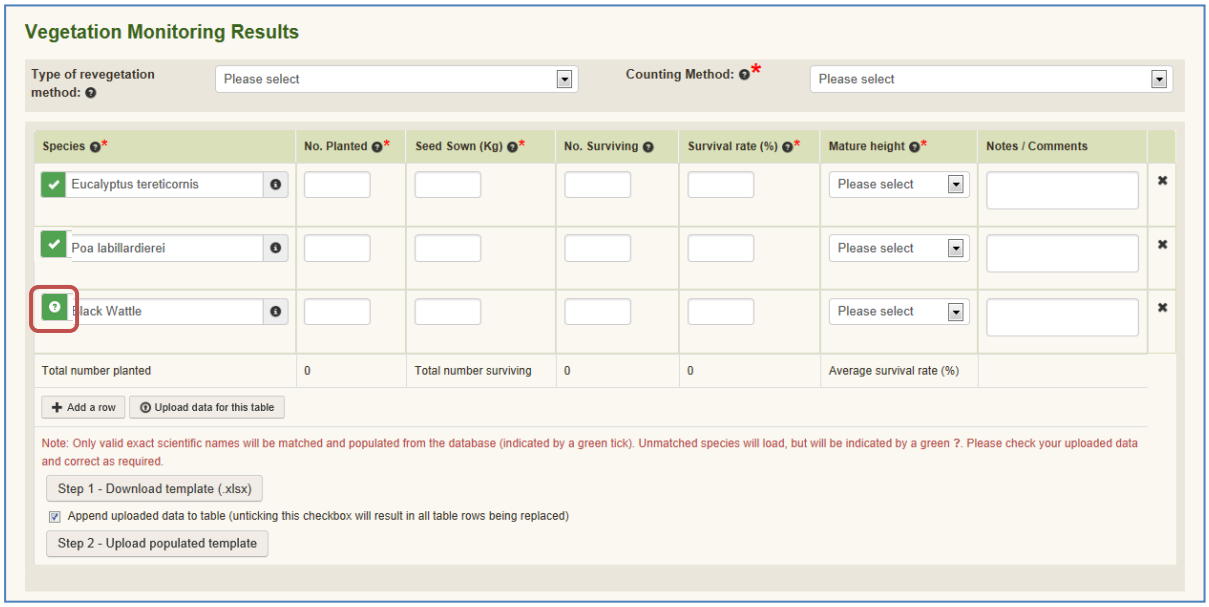


16. Save the template as you normally would for an excel document.

17. Navigate back to MERIT. If you want to replace the data currently in the table with data in the template, untick the **Append uploaded data to table** box. If you want to keep the data currently in the table, leave the **Append uploaded data to table** box ticked.

18. Click **Step 2 - Upload populated template**. Navigate to the template document you saved in Step 18. Click **Open**.

19. The table within MERIT should now be populated with the data you entered into the Excel template. If you haven't done so, populate the remaining mandatory fields in the table.


Vegetation Monitoring Results
Type of revegetation method:
Please select
Counting Method:
Please select
Species
No. Planted
Seed Sown (Kg)
No. Surviving
Survival rate (%)
Mature height
Notes / Comments
Eucalyptus tereticornis
Poa labillardierei
Black Wattle
Please select
Total number planted
0
Total number surviving
0
0
Average survival rate (%)
Add a row
Upload data for this table
Note: Only valid exact scientific names will be matched and populated from the database (indicated by a green tick). Unmatched species will load, but will be indicated by a green ?. Please check your uploaded data and correct as required.
Step 1 - Download template (.xlsx)
Append uploaded data to table (unticking this checkbox will result in all table rows being replaced)
Step 2 - Upload populated template

For species lists - only valid exact scientific names will be matched and populated from the ALA database (indicated by). Unmatched species will load, but will be indicated by . These need to be corrected manually in order for the respective data to be allocated to the right species. In the example above, 'Black Wattle' is a common name, rather than scientific name (one that can be matched with the ALA database). Common names and mis-spellings must be corrected manually by re-typing the common name (or mis-spelt scientific name) to bring up a list of scientific names to choose from.

9.2 Add a photopoint image

Photopoints are used to photographically record landscape changes at a specific point on a site over time. They are not to be used for general snapshots of project activity. These kinds of images should be attached to the project as documents (see Information Sheet 11 for instructions on how to attach a document to your project). Also note that people should not appear in photo point images. Refer to Appendix A for more information on photopoint images.

Images/photos can only be added to activities that have been assigned a site that contains at least one point of interest (POI). Refer to Information Sheet 7 and Information Sheet 8.

1. When entering data (Section 9, Step 5), scroll to the Photo Points section of the activity form.

2. If a site has not been defined for the activity, the error message below appears in the Photo Point section of the form. Scroll back to the top of the activity form and select the relevant site from the drop-down list.

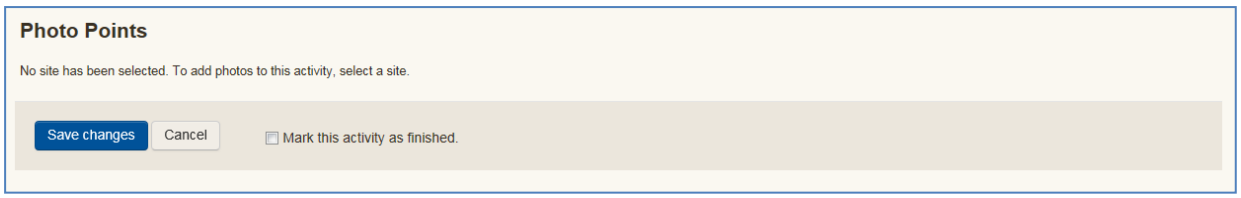
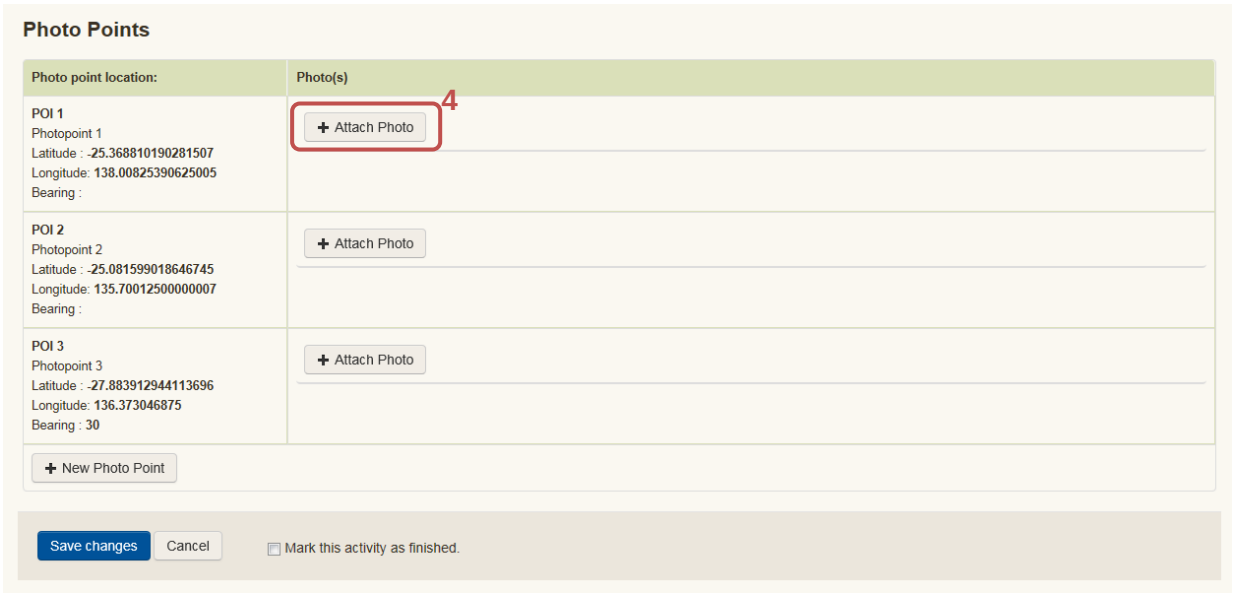


Photo Points
No site has been selected. To add photos to this activity, select a site.
Save changes
Cancel
Mark this activity as finished.

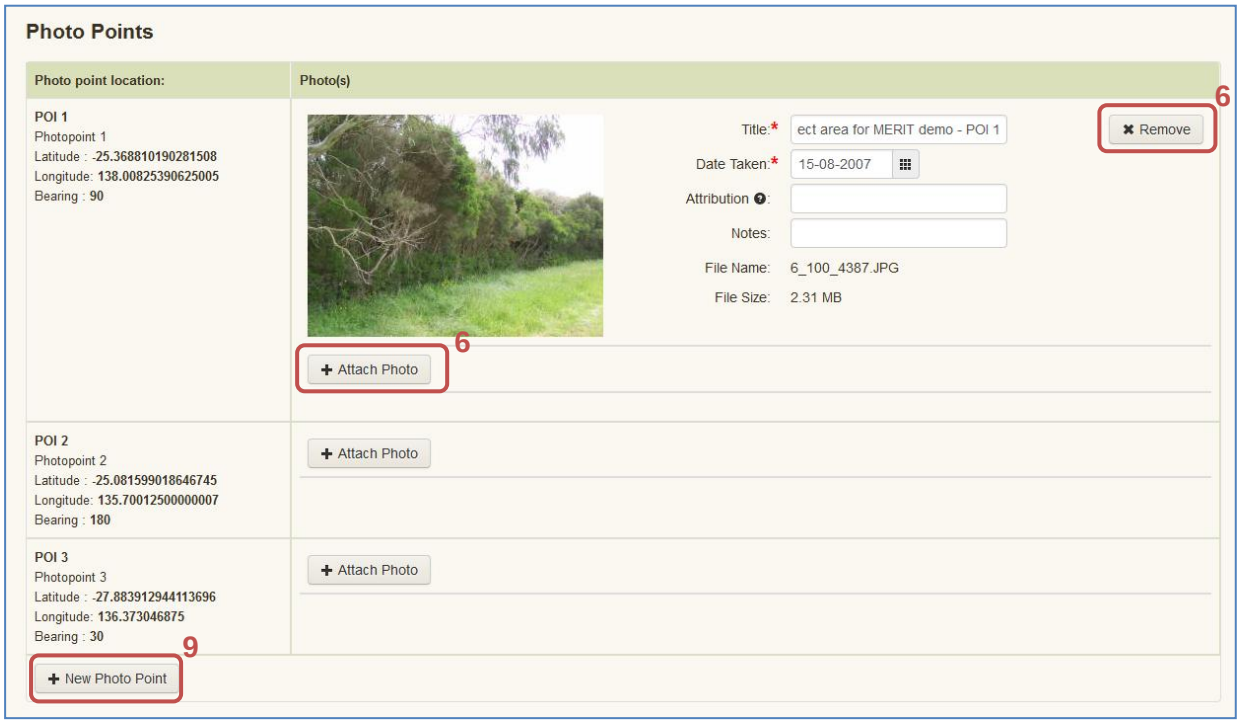
3. Once a site has been defined for the activity, the Photo Points section will display the point/s of interest.



4. To add a photo, click **Attach Photo.**

5. Navigate to where your picture is stored. Click **Open**.

6. The image will be added to the table. To add more images to that POI, click **+ Attach photo,** navigate to where you picture is stored and click open. To delete an image, click **Remove**.



7. Edit the Title, Date taken and Attribution (person who took the photo) if necessary. Add comments in the **Notes** field.

8. Repeat Steps 4-7 to add photos to the remaining POIs.

9. To add a **new** POI photo point, click **+ New Photo Point** and follow the instructions in Information Sheet 8.

10. PROJECT REPORTING – DEFER OR CANCEL ACTIVITY

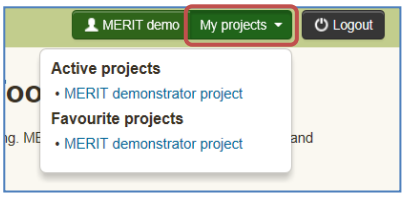
Phase	This plan has been approved	
Access Level	☑ ADMIN	☑ EDITOR

Sometimes an activity, ncluded in the project MERI plan and scheduled to occur within a specific stage, will be postponed to occur in a later stage (deferred). Or a proposed activity will no longer be undertaken as part of the project (cancelled).

Contact your Departmental grant manager to discuss why you need to cancel or defer the activity before changing its status. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing. Refer to Information Sheet 5 for guidance on how to add a new activity to your plan.

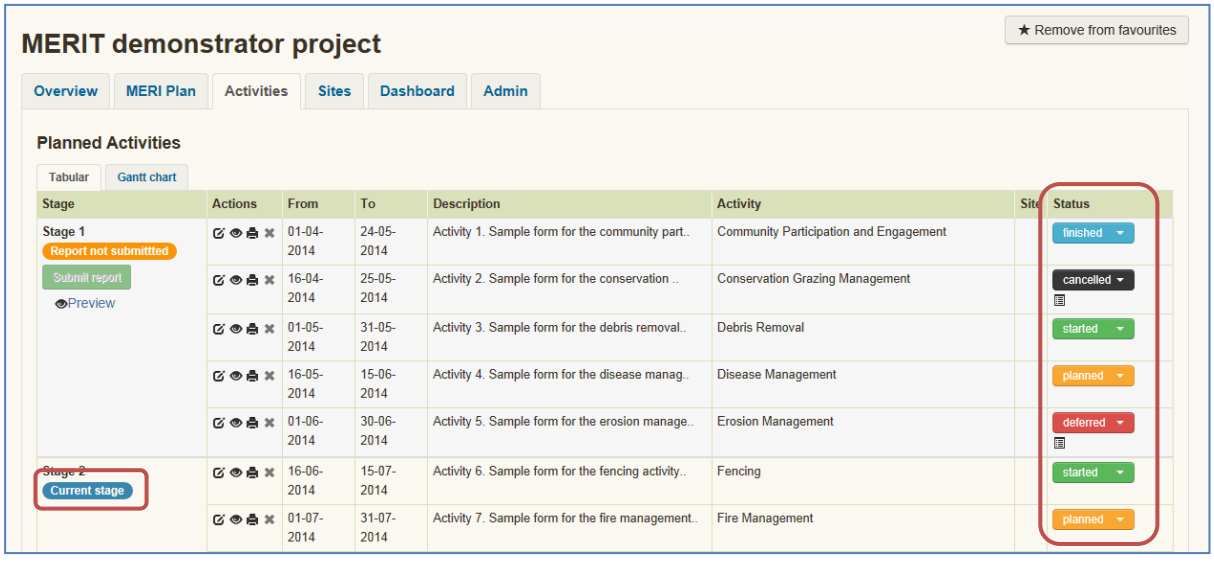
To defer or cancel an activity:

1. Log in to MERIT.

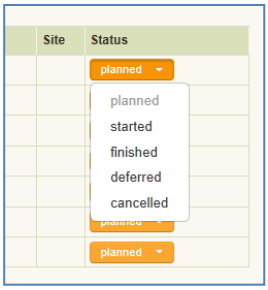


2. Click the **My Projects** button on the menu bar. Select the relevant project.

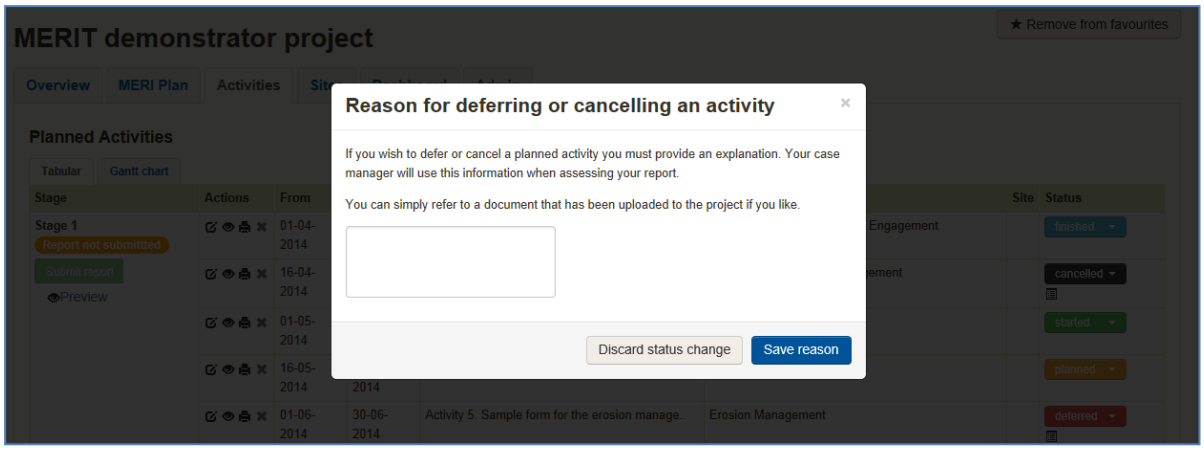
3. Click **Activities** tab and scroll to the Planned Activities section. The current reporting period will be indicated in the 'stage' column.



4. Click the status drop down box for the activity you want to defer or cancel. Select 'defer' or 'cancel' from the drop-down list.



5. A reason for cancelling or deferring an activity must be entered into the pop-up window. Click **Save reason** to save. This information will appear on the Stage Summary (see Information Sheet 12).



6.A new form will need to be manually added to the relevant stage to capture the data for a deferred activity. Contact your Departmental grant manager to discuss why there is a need to defer the activity before changing its status. Once the grant manager is satisfied with the proposed changes, s/he will unlock the plan to enable editing. You can then add a new activity form to the relevant stage (see Information Sheet 5). The plan will need to be resubmitted and approved (see Information Sheet 6). Refer to the MERIT Process flowchart.

11. PROJECT REPORTING – UPLOAD A DOCUMENT

Phase	This plan is not yet approved This plan has been submitted for approval This plan has been approved	
Access Level	☑ **ADMIN**	☒ **EDITOR**

You may wish to submit supplementary documentation to support the information entered into an activity form.

For example:

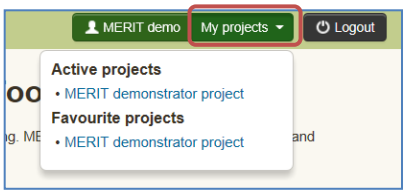
- brochures
- flyers
- management plans
- activity and outcome photos
- videos
- sound bytes

Programme Logic documents can also be uploaded using the instructions below (refer to Information Sheet 5 for guidance on Programme logic).

To upload a document into MERIT:

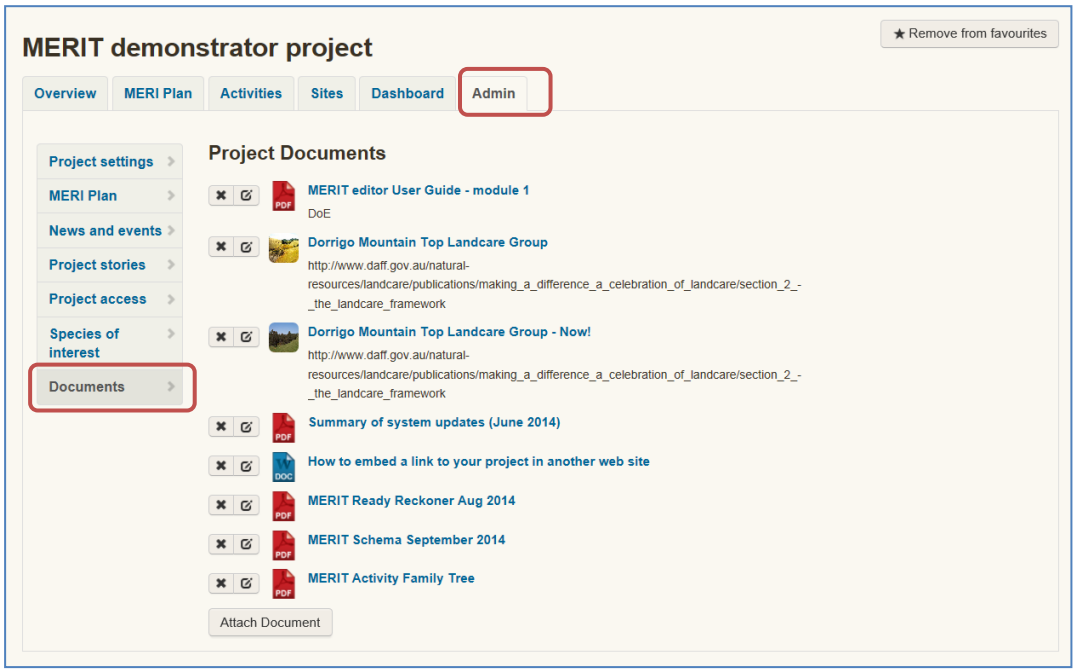
1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.

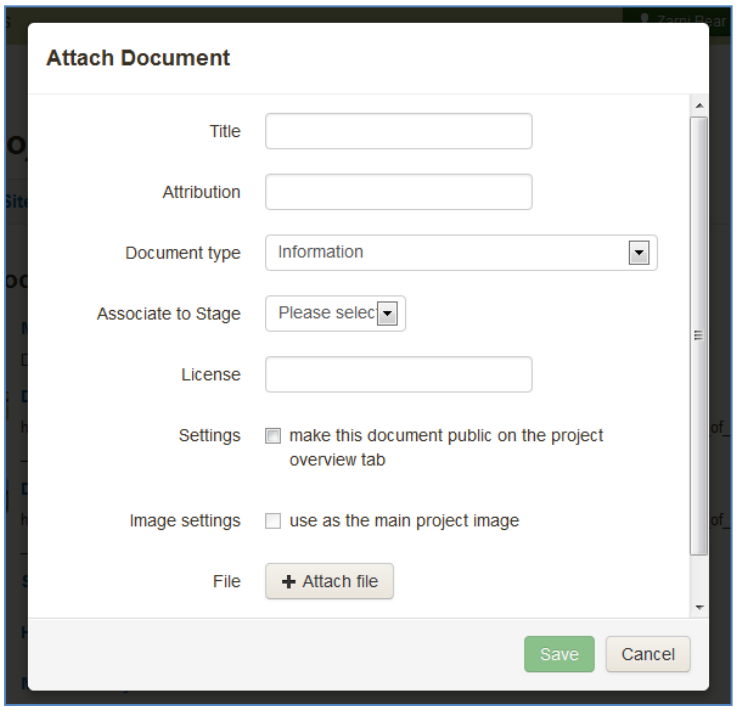


3. Click the **Admin** tab on the Project home page.

4. Click **Documents** sub-tab on the left of the screen.



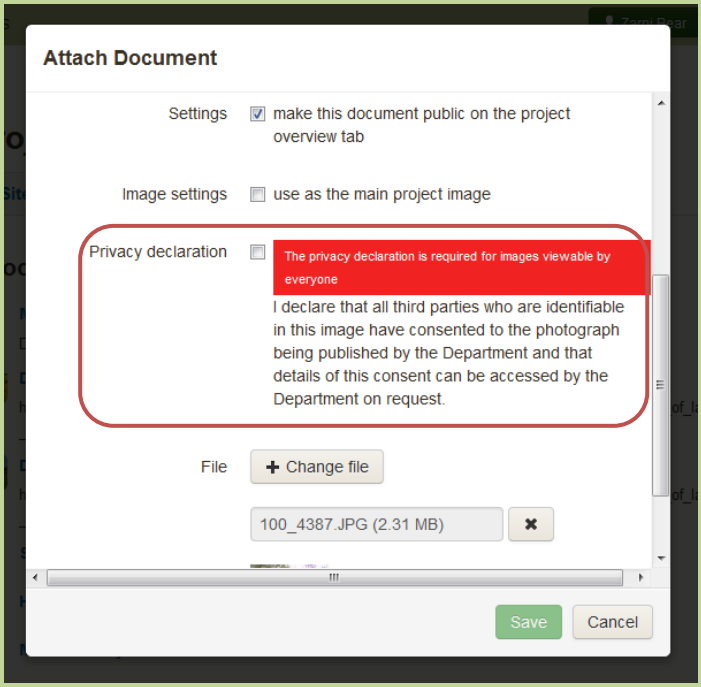
5. Click the **Attach Document** button and complete the fields in the pop-up window:



Field	Option
Title	Type an easily understood title for the document.
Attribution	The person who created the document/ took the photo. The contact person for further information on the document.
Document type	Choose from the drop down list. Information – document will appear on the Overview tab. Programme logic – document will appear on the MERI Plan tab.
Associate to Stage	Use if the document relates to an activity conducted during a specific stage.
License	Entity who owns the document. May be a regional body or government department.
Settings	Tick this box if you want your document to be visible to the public on the project overview page. This box cannot be ticked if you chose 'programme logic' as the document type.
Image settings	Tick this box if you want your document to be one of the main project images on the Overview tab.

6. Click **+ Attach file**. Navigate to where your document is stored. Click **Open**.

If you ticked the 'make this document public on the project overview tab' checkbox and the file you are uploading has a graphic file format (e.g. .jpeg, .gif, etc), a privacy declaration statement appears in the pop-up window. This declaration must be agreed (ticked) in order to save/upload the file. Refer to your funding agreement for the documentation required.


Attach Document
Settings
make this document public on the project overview tab
Image settings
use as the main project image
Privacy declaration
The privacy declaration is required for images viewable by everyone
I declare that all third parties who are identifiable in this image have consented to the photograph being published by the Department and that details of this consent can be accessed by the Department on request.
File
+ Change file
100_4387.JPG (2.31 MB)
Save
Cancel

7. Click **Save**.

8. The document will be added to the list on the Admin/Documents sub-tab. It will also appear on the **MERI Plan** tab (programme logic only) or **Overview** tab (all other information).

9. To delete a document, or edit the document details, navigate to the list of project documents on the Admin/Documents sub- tab and click either Edit or Delete.

12. PROJECT REPORTING – SUBMIT REPORT FOR APPROVAL

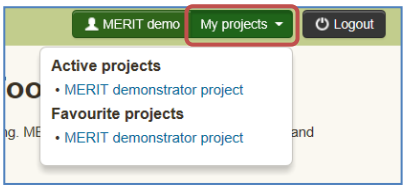
Phase	This plan has been approved
Access Level	☑ ADMIN ☒ EDITOR

The **Submit report** button automatically appears in the Stage column of the project's activities list the day after the last day of the current stage. For most projects, this is 1 July and 1 January.

To submit a report for approval:

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.



3. Click the **Activities** tab on the Project home page.

4. Scroll to the stage in the activities list that you want to report on.

5. Note that the Current stage tag has been replaced by a Report not submittted tag, followed by a Submit report button.

6. View the data entered into each of the activities for the current stage. Is it correct? Is it complete? Edit the activity if required.

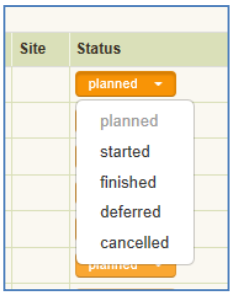
If you need to amend data in an activity that has a status of 'finished', either

a) **Edit** the activity, uncheck the **Mark this activity as finished** box and click **Save changes**, or

b) Select 'started' status from the drop down list for the activity.

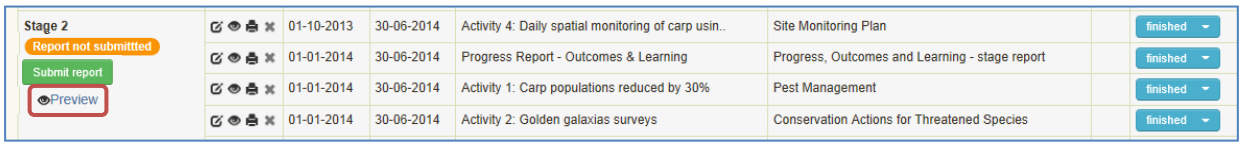
7. The status for each activity in the stage must be 'finished', 'deferred' or 'cancelled' before the report can be submitted. If the **Submit report** button is not active, the likely cause is that there are 'planned' or 'started' activities remaining in the stage.

8. You can change the status of an activity by clicking the drop down list in the status column. Refer to Information Sheet 10 for more information on how to cancel or defer an activity.



If an activity is partially completed, with the remaining work carried over to the next stage, consider marking the activity as 'finished' and creating a new activity in the next stage to capture the outstanding work. Contact your Departmental grant manager to discuss why you need to do this before changing the activity's status.

9. Click the **Preview** link in the Stage column. This generates a Stage Summary in HTML format. Refer to **Section 12.1** below for more information on the Stage Summary.



10. Once you are satisfied that all the data within each activity is accurate, click **Submit Report** button in the Stage column.

Submitting a report for approval does 3 things:

1. Automatically sends an email to the Departmental grant manager advising the stage report is ready to be reviewed.

2.'Locks' the report for that stage so that no further data changes can be made by the Administrator/s or Editor/s.

3. Generates a Stage Summary document in PDF format that is automatically saved to the list of project documents on the Overview tab. The document can only be viewed by users with access to the project.

12.1 Stage Summary

The Stage Summary collates key activities and outputs for the current or past stages into one document:

- Basic project information (project names, funding, start dates, ID #s etc)
- Summary of how many activities were planned/started/finished/deferred/cancelled in the stage
- List of any documents attached during the stage
- Table summarising the outputs achieved vs targets
- Project outcomes – from the MERI Plan (only if entered into MERIT)
- Project progress and issues (all information in the *Progress, outcomes and learning* activity form)
- Table of project risks (from the Project risks & threats section on the Activity tab at the time the summary is generated).
- Progress against each activity (type, status, actual start and finish dates, deferred/cancelled reasons and comments from each activity form)

The Stage Summary is generated manually and automatically. The Preview icon becomes active (and remains active) from the day after the last day of a stage (e.g. for most projects, 1 July or 1 January).

12.1.1 Manual

1. Navigate to the project's **Activities** tab (Section 12, Steps 1 to 4).

2. Click the **Preview** link in the Stage column. This generates a Stage Summary in HTML format.

3. The HTML document can be printed, for review, or saved using the tools on your browser.

12.1.2 Automatic

4. When a funding recipient submits a stage report for approval (via the **Submit Report** button on the **Activities** tab, Section 12, Step 10)) a PDF of the Stage Summary is automatically generated and saved to the list of project documents that appears on the Overview tab. The Summary can only be viewed by users with access to the project.

It is useful to manually generate a copy of the stage summary prior to submitting the stage report for approval. This will allow you to check that the report is complete, comprehensive and accurate. Some organisations may want to use the stage summary as an internal 'sign-off' document prior to submitting the report to the Department.

13. CREATE / EDIT NEWS & EVENTS AND PROJECT STORIES

Phase	This plan is not yet approved This plan has been submitted for approval This plan has been approved	
Access Level	☑ ADMIN	☒ EDITOR

The News & Events feature enables funding recipients to publish news and event information that they may want to share with the general public.

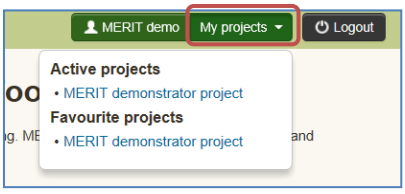
The Project Stories feature enables funding recipients to publish stories about their project that they want to share with the general public. These can be summarised progress reports, project outcomes to date etc.

Both News & Events and Project Stories are displayed on the project's Overview tab and are viewable by anyone.

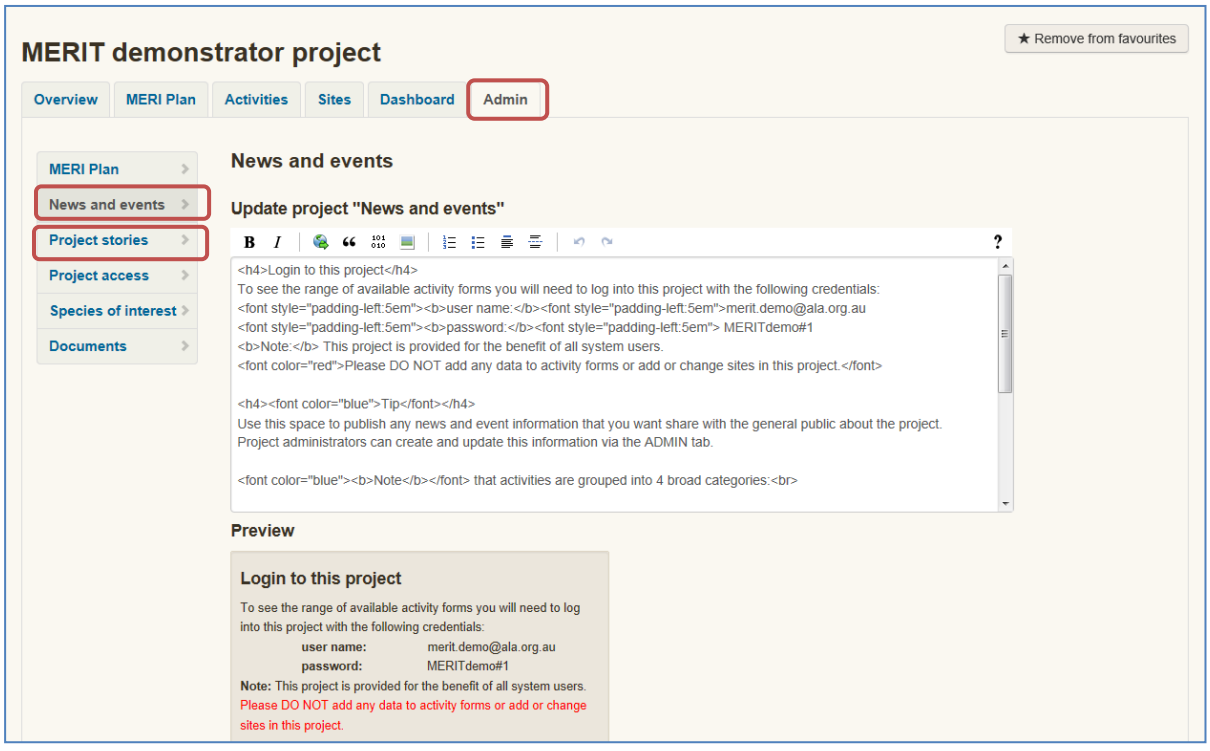
To create or edit News & Events or Project Stories:

1. Log in to MERIT.

2. Click the **My Projects** button on the menu bar. Select the relevant project.

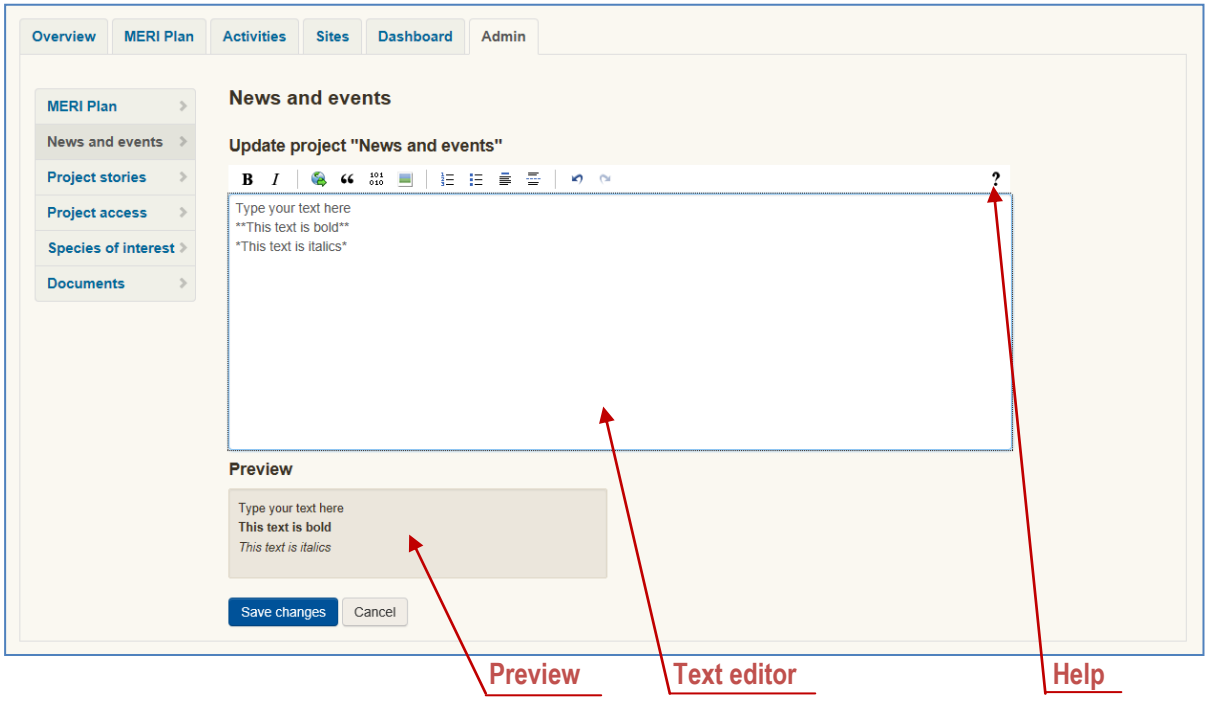


3. Click the **Admin** tab on the Project home page. Click either the **News and events** sub-tab or **Project stories** sub-tab.



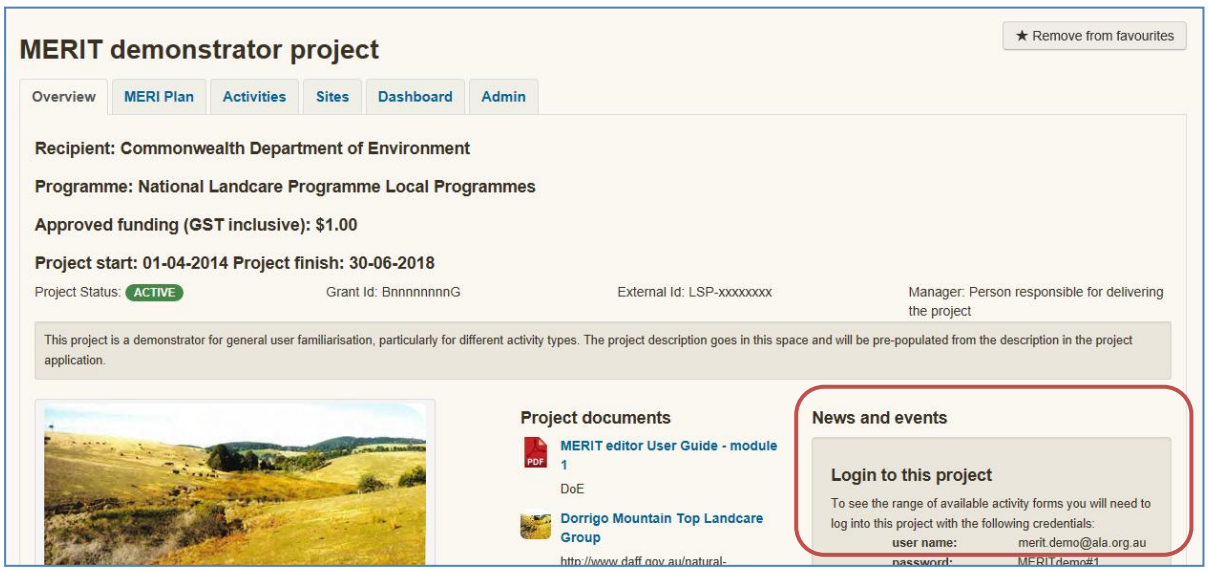
4. MERIT uses Markdown Syntax for formatting plain text. It is a simple HTML text editor for basic formatting and is a little bit different to Microsoft Word. Rather than typing out a passage then adding formatting afterwards with mouse clicks and formatting tools like buttons and dropdowns, Markdown allows a writer to use a very simple set of symbols to denote the desired format of the text. Click on the **? Help** link for examples or search 'Markdown Syntax Cheatsheet' using your web search engine.

5 . Type your text into the editor (white box). The Preview box will indicate how your text will appear on the Overview tab. Experiment with the editor before you attempt to enter your information.



6. Click **Save changes** button at the bottom of the page when you are finished.

7. Click the **Overview** tab and your 'News and Events' or 'Project Stories' text will appear on the right of the screen


MERIT demonstrator project
★ Remove from favourites
Overview
MERI Plan
Activities
Sites
Dashboard
Admin
Recipient: Commonwealth Department of Environment
Programme: National Landcare Programme Local Programmes
Approved funding (GST inclusive): $1.00
Project start: 01-04-2014 Project finish: 30-06-2018
Project Status: ACTIVE
Grant Id: BnnnnnnnnG
External Id: LSP-xxxxxxxx
Manager: Person responsible for delivering the project
This project is a demonstrator for general user familiarisation, particularly for different activity types. The project description goes in this space and will be pre-populated from the description in the project application.
Project documents
MERIT editor User Guide - module 1
DoE
Dorrigo Mountain Top Landcare Group
News and events
Login to this project
To see the range of available activity forms you will need to log into this project with the following credentials:
user name: merit.demo@ala.org.au

WANT MORE INFORMATION?

Click the **Help** link on the MERIT menu bar to read answers to frequently asked questions.

Click the **About** link on the MERIT menu bar to read recent news and information on enhancements and fixes.

The MERIT team also emails regular newsletters highlighting recent updates and future enhancements. Important news is also sometimes included in a pop-up box that appears when you log into MERIT.

GLOSSARY OF TERMS

Activity: an action that is undertaken to achieve project outputs and outcomes. Refer to the Activity Ready Reckoner for the list of activities and definitions.

Activity Family Tree: a one-page table demonstrating the temporal relationship between activities. Commence reading the table from the centre 'Primary Activity' column. Activities to the left are those you may choose in preparation for the primary activity, including baseline data collection. Activities to the right are those you may choose for monitoring/maintenance of the activity, including comparison to baseline data.

Administrator: is a level of access in MERIT which enables you to view all information for your project; input, edit and submit project data and reporting to the Department; and assign access permissions to other people (e.g. project managers, sub-contractors).

Appropriateness: a determination made through comparing the programme with the needs of the intended beneficiaries using any of the techniques of needs analysis. Alternatively, a programme could be evaluated in terms of its compliance with process.

Department: is the Australian Government Department of the Environment.

Description (activity): is the description of an activity that you identified in the activity schedule of your MERI plan. The activity description appears in the 'description' column of the 'Activities' tab of your project page in MERIT.

Description (project): is the description of your project, which you provided in your project application. The project description appears on the 'overview' tab of a project page in MERIT.

Editor: is a level of access in MERIT, which enables you to view all information for a project; input and edit activity data and reporting. It does not allow you to submit project data and reporting to the Department or assign access permissions to other people.

Effectiveness: a measure of the extent to which a programme, project or initiative has attained, or is expected to attain, its relevant objectives efficiently and in a sustainable way.

Efficiency: the notion of getting the highest value out of programme or project resources.

Favourites: are projects which you are interested in and have selected by clicking the 'Add to favourites' button in the top right of a project page in MERIT. Your favourite projects can then be accessed by clicking the 'My projects' button in the top right of the screen when you are logged in to your profile.

Funding recipient (grant recipient): is an individual or organisation that has received funding for a project through an Australian Government NRM programme.

Grant manager (case manager): is a Departmental officer that manages projects funded by Australian Government NRM programmes in cooperation with the funding recipient.

Impact: a change in the condition of biophysical, social or economic and/or institutional assets. An impact may be positive or negative, primary or secondary, short term or long term, direct or indirect, and/or intended or unintended. Impacts are sometime realised after the formal project is completed.

MERI: Simple concepts that, when applied, help us understand what is being achieved and help identify possible improvements, for projects and programmes:

- **Monitoring:** the collection of data and information.
- **Evaluation:** analysing the monitoring data and assessing what it means. Based on this, informed judgements can be made about the success of a project or programme and improvements can be identified.
- **Reporting:** communicating what we have found out through monitoring and evaluation. It is about sharing information, including about achievements and lessons learnt.
- **Improvement:** using this information to improve the way things are done.

NRM programme: refers to Australian Government funded NRM programmes, such as National Landcare Programme.

Outcomes: are the tangible and measurable changes resulting from maintenance of and/or improvement in NRM assets (e.g. vegetation condition change, recovery of threatened species). These may be immediate, intermediate or longer-term outcomes.

Outputs: also referred to as ‘deliverables’, are the tangible (measurable and practical), immediate and intended results to be produced through NRM investment (e.g. area (ha) of revegetation completed, number of stakeholder engagement sessions held).

Output Targets: are the total project outputs that a project has committed to achieve. These are captured from your MERI plan and displayed at the bottom of the ‘Activities’ tab of a project page in MERIT.

Participant: A person who attends an event or participates in an activity including employed and not employed people (unless otherwise specified).

Point of Interest: is a marker for a specific geographic location which can be added through the ‘sites’ tab of a project page in MERIT or via an activity form (for photo points). Funding recipients can use this to mark a range of features which will be useful to them such as the location of specific plantings within a larger site or the location of threatened species.

Project: included in MERIT are:

- an individual funded project under:
  - Caring for our Country Targeted Area Grants;
  - Caring for our Country Reef Rescue;
  - Caring for our Country Community Environment Grants;
  - Biodiversity Fund Round 1;
  - Biodiversity Fund Round 2;
  - Biodiversity Fund Investing in Tasmania's Native Forests;
  - Biodiversity Fund Northern Australia Targeted Investment;
  - Green Army;
  - National Landcare Programme, and
- a sub-project funded under:
  - Caring for our Country Regional Delivery (sustainable environment).

Project MERI plan: is a document prepared by funding recipients to clearly set out the project activities to be undertaken, and the intended outputs and outcomes of the project.

Ready Reckoner: a three page summary table of each activity, minimum data requirement (mandatory fields), target measures (outputs) plus more. The Ready Reckoner can be accessed from the Project Documents on the *MERIT Demonstrator Project* Overview page or via the MERIT resources page on the National Landcare Programme website.

Schema: Word document that contains every field, field type and mandatory fields for each activity form. It also lists the outputs that are currently used for reporting. The Schema can be accessed from the Project Documents on the *MERIT Demonstrator Project* Overview tab or via the MERIT resources page on the National Landcare Programme website.

Site: is a defined geographic location relevant to a project. Sites can be defined using the mapping tools available in the 'sites' tab of a project page in MERIT. Funding recipients can create sites at their discretion which allow them to represent their project. In some instances, it may be preferable to identify a site as a whole project area, or alternatively as a number of more specific smaller areas.

SMART: A mnemonic acronym, giving criteria to help in setting objectives:

- **Specific:** a specific goal has a much greater chance of being accomplished than a general goal. Consider who is involved, what do I want to accomplish, where is the activity happening, what is the timeframe, are there any requirements or constraints and the

specific reasons, purpose or benefits of accomplishing the goal. For example, a general goal is 'get in shape', a specific goal is 'join a health club and workout 3 days a week'.

- **Measurable:** establish set criteria for measuring progress toward the attainment of each goal you set. Consider how much, how many, how will I know when it is accomplished?
- **Attainable**: an attainable goal will usually answer the question 'How'. A goal should be neither out of reach nor below standard performance, since these may be considered meaningless. Consider how can the goal be accomplished, how realistic is the goal based on other constraints?
- **Realistic**: a goal should be realistic and relevant. A goal that supports or is in alignment with other goals would be considered a relevant goal. Consider does this seem worthwhile, is this the right time, does this match our other efforts/needs, is it applicable in the current socio-economic environment?
- **Time-bound**: a goal should have a timeframe within which it should be accomplished.

Stage: is a six-monthly time period which is used in MERI plans and MERIT to delineate activities for reporting purposes. Stages are identified in the left column of the activity schedule of MERI plans or in the left column of the 'Activities' tab of a project page in MERIT. In MERIT an activity is assigned to a stage based on the timeframe during which it is scheduled to occur.

Stage Summary: a document that summarises key information on the activities and achievements within a stage.

Status: is used in MERIT to identify and track progress of an activity. MERIT includes the following status options:

- **Planned**: an activity that has been included in the project MERI plan but has not yet been commenced
- **Started**: an activity that has been included in the project MERI plan, work on undertaking the activity has commenced and data entered into MERIT
- **Finished**: an activity that has been included in the project MERI plan and all necessary actions to complete the activity have been undertaken
- **Deferred**: an activity that has been included in the project MERI plan and was scheduled to occur within a specific stage, but will now occur in a later stage
- **Cancelled**: an activity that has been included in the project MERI plan and was scheduled to occur, but will no longer be undertaken as part of the project

Submit for approval: sends a project's MERI Plan, list of planned activities and output targets to the Grant Manager/s for approval.

Submit Report: sends the data collected for the planned activities, undertaken in the current reporting period, to the project's Grant Manager/s for approval.

Themes: are programme- specific priorities for investment which are defined in the relevant programme guidelines.

Acronyms

ALA: Atlas of Living Australia

DoE: Department of the Environment

DSE/ha: Dry sheep equivalents per hectare (a measurement for sustainable carrying capacity of paddocks)

LGA: local government area

MERI: monitoring, evaluation, reporting and improvement

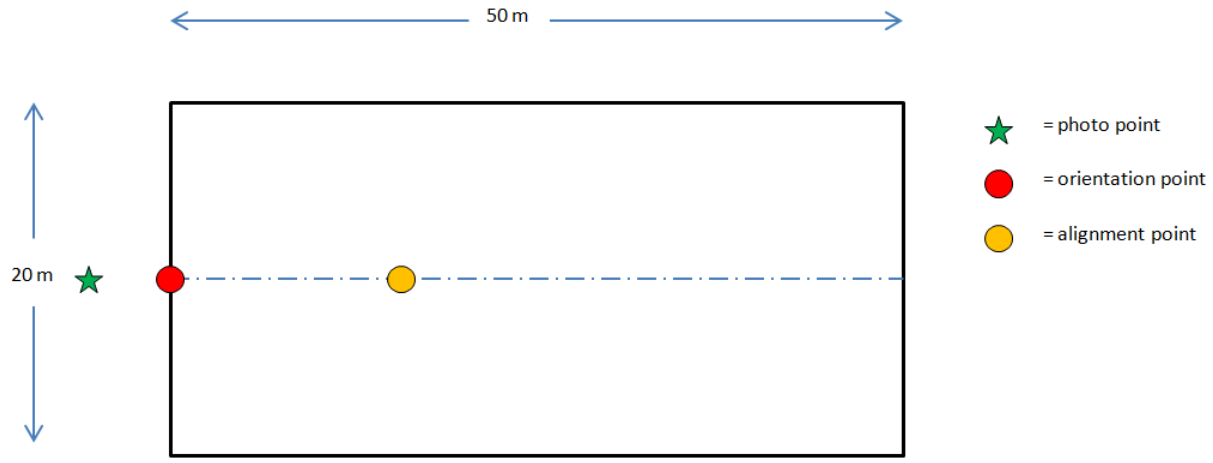
MERIT: online monitoring, evaluation, reporting and improvement tool

NRM: natural resource management

APPENDIX A – GUIDELINES FOR TAKING PHOTOGRAPHS

Photo point

Setting up and using a photo point to obtain a time-series of photographs of the same feature is an effective way of keeping a photographic record of change. A photo point is a fixed point on the ground from which photographs are taken along a fixed bearing. In this case the photo point ★ is located 5 metres from the start of the transect, and is the only fixed position from which plot images will be taken. The reference marker ● (located at the start of the transect) and the alignment marker ● (located 20 m along the transect) will act as 'sighter' posts for taking the fixed image (see below image). These posts should be in the centre of the frame so the image captures equal areas of the left and right sectors of the plot (i.e. the photo is aligned directly along the transect bearing).



The fixed photo can be oriented in landscape or portrait. A rule of thumb is to use landscape where you can adequately capture the overstorey canopy, otherwise use portrait (normally for taller forest and woodland types). Future photos taken from the photo point will always use the same orientation as the initial photo. Orientation and transect bearing will be recorded on the pro forma in the Standard and Abridged Field Guides. Always stand (do not sit) when taking the plot photo, so that images are always taken at eye level.

If a shrub or some other feature is obstructing the line of site along the transect, then ignore it and take the image anyway. Obstructions come and go over time. The important thing is that photographs provide a visual record of vegetation change.

Disturbance to the site should be minimised for taking photographs. For example, do not physically remove objects to create a better line of sight, and minimise the level of trampling between the photo point and the sighter posts. It is best to record the fixed image immediately after delineating the plot, rather than after completion of field survey.

Opportunistic photographs

Taking field images of interest in addition to the fixed photograph is encouraged. These may include photographs of:

- native plants and animals,

- habitat features (e.g. hollow-bearing trees, bird nests, coarse woody debris),

- weed infestation before and after intervention,

- disturbance incidents (e.g. wind throw, floods),

- 'typical' stands of the vegetation type in and around the plot, and

- the surrounding landscape.

The position of the photographer in relation to the transect (i.e. transect distance and perpendicular distance right or left) and the photo bearing should be recorded on the pro forma so that the feature can be revisited updated images possible recorded during future monitoring.

Image nomenclature

The image taken at the photo point should be named after the Project and Plot ID, with a prefix for the year in which it was undertaken, and a 'P' to indicate it is the standard plot photo.

For example CFOC0208_Plot01_2012_P

Additional images taken at other points in the plot, or perpendicular to the plot transect, should use the same nomenclature, but with a trailing number to show that it is an opportunistic rather than the standard image.

i.e. CFOC0208_Plot01_2012_1; CFOC0208_Plot01_2012_2; CFOC0208_Plot01_2012_3 etc.

Intervention-specific images taken at other photo points should use a similar naming convention so that images can be conveniently associated with the project ID, the intervention, and the year of sampling.